

CLARITY ENTERPRISE PROJECT TOOL USER MANUAL FOR THE PROJECT USER

Internal Global Project Management Office

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1 INTRODUCTION

1.1 About Clarity

Clarity is the Enterprise Projects Tool, implemented by Emerson Process Management to manage the projects and engineering business in an efficient and consistent way. Key functions in the Clarity Enterprise Projects Tool are Labour management, project planning (Work Breakdown Structure), Electronic timesheets, resource management, and scope management.

The tool provides an enterprise infrastructure with a single, global database that supports harmonization of processes and structures, global resource sharing and a comprehensive view on all labour data.

1.2 Purpose of this Manual

The purpose of this document is to provide a work instruction to all users of the Clarity projects tool. This manual covers the basic functionality only, required by most users. These users are called the 'Project Users', and the scope covers mainly:

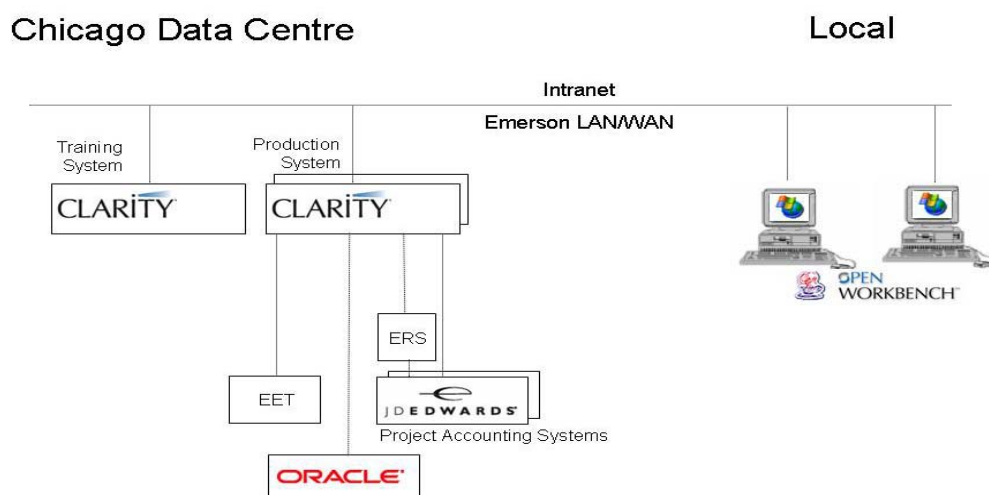
- Managing your personal account
- Project participation (collaboration)
- Time reporting

For Project Managers and Resource Managers, separate manuals are available.

This document does not include all functions and possible options from all of the Clarity menus. It only describes the most commonly used functions and those functions that are required to work with Clarity as it is implemented for Emerson Process Management.

1.3 Clarity Infrastructure

The Clarity tool is an enterprise tool, installed on a number of central servers located in the Chicago Data Centre in the USA. User can connect to these servers via the Emerson Wide Area Network.



Clarity is a web-based tool, and therefore requires no client software installations on the local computer for normal project users.

Ensure that the right version of Internet Explorer is installed. Minimum requirement is version 5.5. Service Pack 2 and above

The URL for the Production system is:

<http://clarity.emersonprocess.com/niku/app>

There is also a test & training system available, so please ensure that you login to the correct system. To easily recognize the two systems, the menu bars in the test & training system have been given a different colour. Production is **BLUE** and Training is **GREEN**

The URL for the Training system is:

<http://trnclarity.emersonprocess.com/niku/app>

The test & training system can be used if you want to check certain functionality before using it on the production system. The test & training system is also used by the system administrators to test new functionality or new software releases, so occasionally it might occur that the test & training system is loaded with a different software version.

The production server shall only be used according the documented procedures, as this is a mandatory Emerson Process Management business tool that interfaces to the Emerson JD Edwards/ORACLE business systems.

1.4 System Set-up

Although the Clarity tool is a fully web-based tool, and only requires an Internet browser to operate the tool, there might be some installations or special browser settings required if you work on your local PC. These are described in a separate set-up document. Ask your local IT contact for assistance.

If you are a Citrix Metaframe user, all settings have already been done at the Citrix Metaframe server.

Before you start using the system for the first time, you should first set-up your account information in the '*Account settings*' menu (refer to paragraph 3.6)

1.5 Revision History

Removed from this document:

- PMO documentation no longer stored in the Knowledge Store
- Document Manager details removed due to release of Electronic Document Management System (EDMS) on Sharepoint.

Added in this document:

- New side pane hide feature

- New tab layouts on Project Properties Page
- New method of Financial Enablement
- Dashboard Enhancements

1.6 Reference Documents

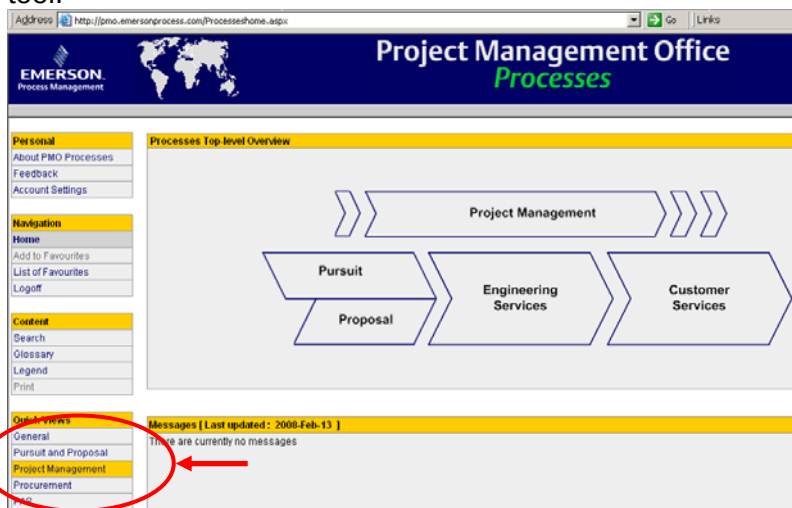
Clarity User's Guide's (Electronic documentation available in the Clarity help menu). These Clarity help files do provide help on how to operate the various screens in Clarity.

Retreive the latest versions of the following documents from the 'ProcessWorld' – 'Project Management Office' 'Processes' website:

Clarity User Set-Up - Client Software Installation. This document describes the set-up of the local computer for the correct operation of Clarity.

'Clarity Enterprise Projects Tool User Manual for the Project Manager'. This document describes the methods used by the Project Manager.

EPT Data Dictionary. This document is available on the PMO website, this is the definitive copy that is continually updated. The document contains all data definitions and codes that are used in the tool.



1.7 Support

When you are encountering access problems (password reset) or need any further help, you can raise problems through the Merlin helpdesk, via the web portal at <http://helpdesk.emersonprocess.com> or by email: Merlin.Helpdesk@emersonprocess.com.

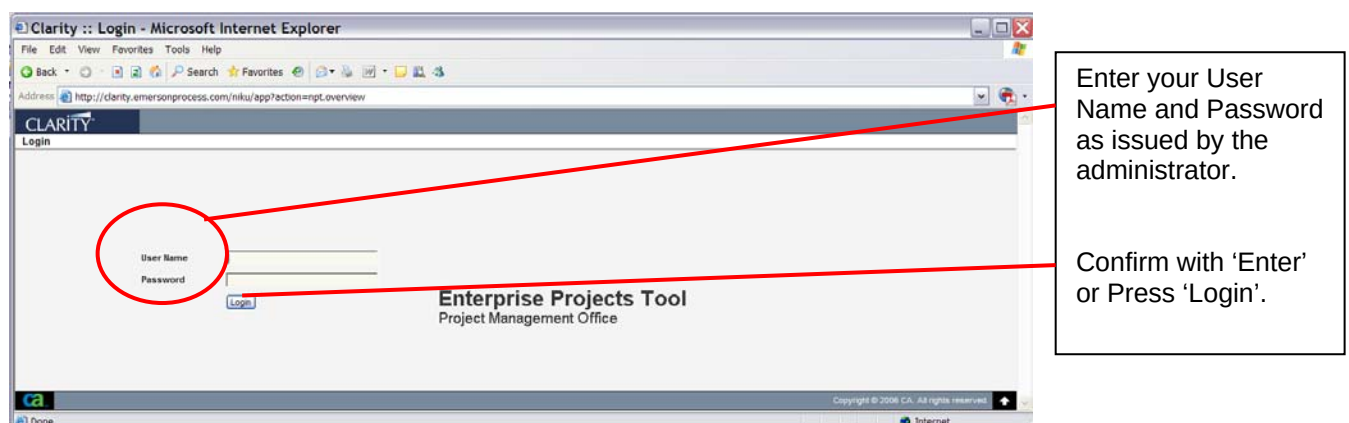
2 OVERVIEW

2.1 Login to Production System

When the Internet explorer is launched, browse to the following URL to access the live production system:

<http://clarity.emersonprocess.com>

The Clarity login screen will now appear:



The login name is normally the first letter of your first name and your full last name (all lower case, no spaces). If you have forgotten your username or password, you should contact the helpdesk.

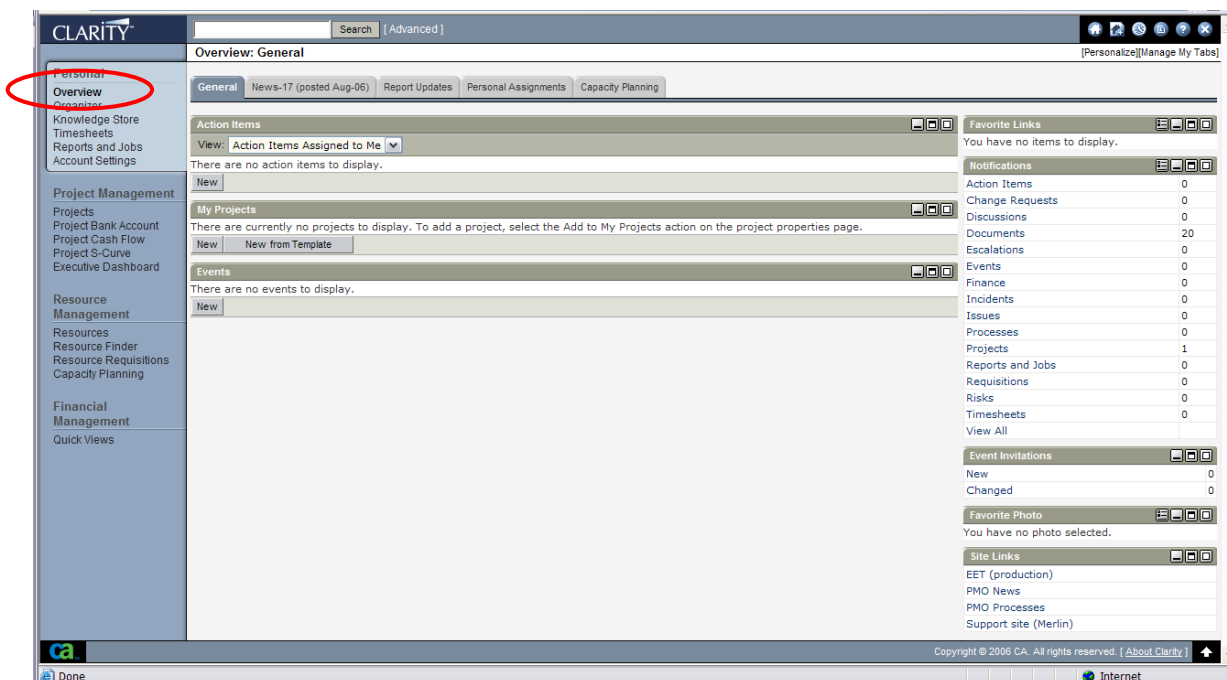
2.2 Login to Test & Training System

The login to the Test & Training system requires a different URL: replace the **clarity** in the URL as listed above with **trnclarity**. The username and password may not be the same as on the production system, since the database on the Test & Training system is frequently updated with the data from the production system and they may be out of synchronisation.

2.3 The 'Personal Page'

After you have logged in, the overview screen will appear. This is a personal page for each individual user. The overview screen displays:

- The menus that the user has access to, listed on the left side of the screen.
- The 'favourites' projects and reports that the user has configured to get direct access
- A varied set of Notifications (alerts).
- Some items to personalize this page.
- Two sets (a personal and a company set) of hyper-links.



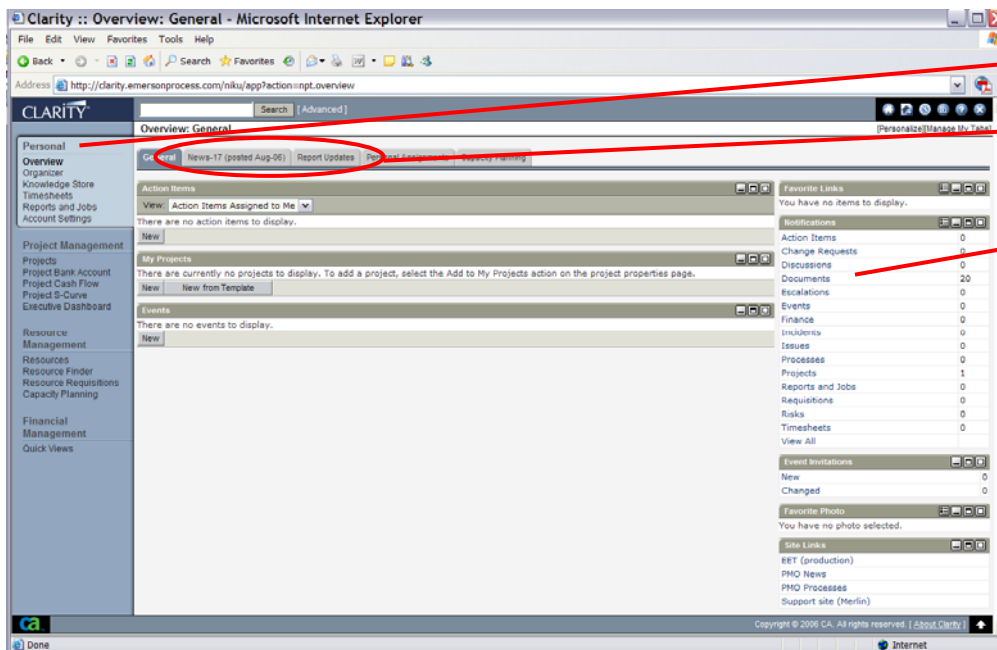
The detailed layout of this screen will depend on:

- The user profile (access rights) that are configured for you. This will impact the available menus on the left side of the screen. These menus will be discussed in the following chapters of this user manual or in other user manuals.
- The settings that are configured for this account. This will impact the information that is shown on the middle and right side of the screen. These items are user configurable and will be explained in the paragraph 2.5 and 2.6.

2.4 Navigation

In the tool, there are different ways to navigate between the various menus:

- The navigation menu bar that is always present on the left side of the screen
- Miscellaneous horizontal tabs (which sometimes have set of sub-tabs)
- Click on the hyperlinks on the screen.

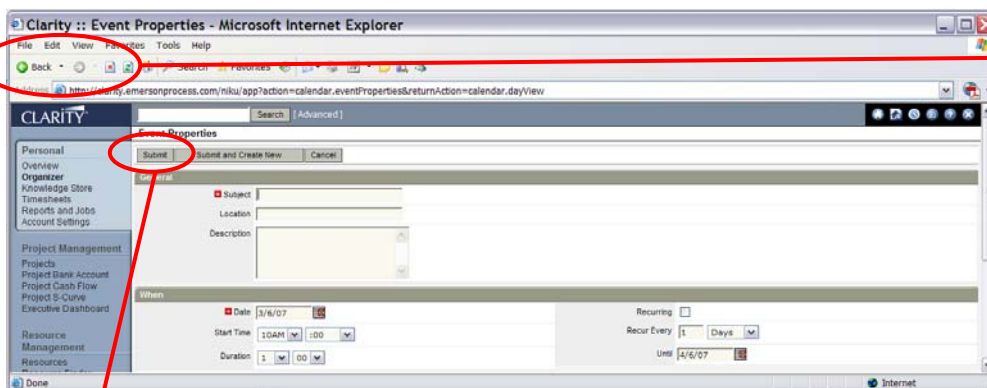


From the menu

Horizontal tabs

Hyperlinks (click on the name of an object)

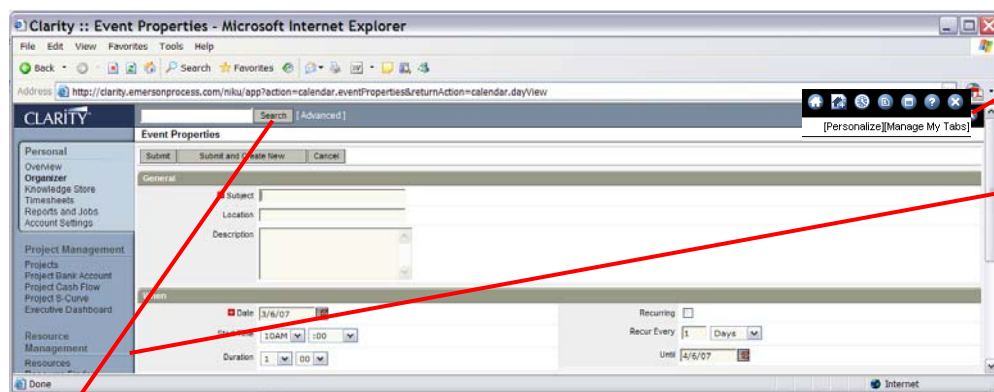
Since the tool is fully web based, navigation can also be done using the standard Internet explorer commands, like 'Back', 'Forward', 'Refresh' etc.



The normal windows explorer commands can be used for navigation.

! Important:

All data on the screen is displayed as web pages. Navigating to another web page will just display the next page, without further embedded logic. This implies that if data has been entered on the previous page, this data will be lost. Saving of data needs to be done explicitly by the user. On each data entry page where the user has the rights to modify or create data, a 'Save', 'Submit', 'Continue' or 'Finish' button is displayed that is required to save the data.



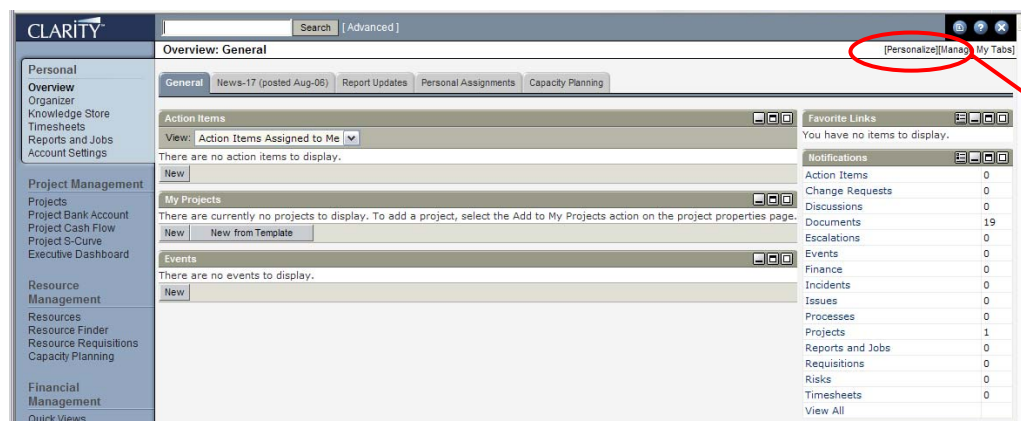
Other shortcuts on the header banner:

- Home
- Set as Homepage
- Current Timesheet
- **Toggle Navigation Visibility (Hide side pane)**
- The Personal Calendar.
- Clarity Help Function.
- Logout.

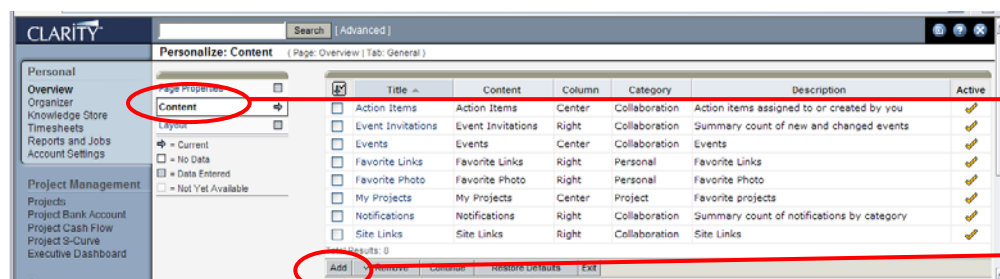
The search function can be used to search in forms and documents where the user has access. The search is not case sensitive and wildcards (*) can be used (at the end of words only).

2.5 Personalize the Desktop

The appearance of the overview page is user configurable. This is free for any user to select and will not affect the system operations. However, these settings will have an effect on how information will be presented to the user and if information is easily accessible.



Select 'Personalize' from the home page to change the appearance of this page.



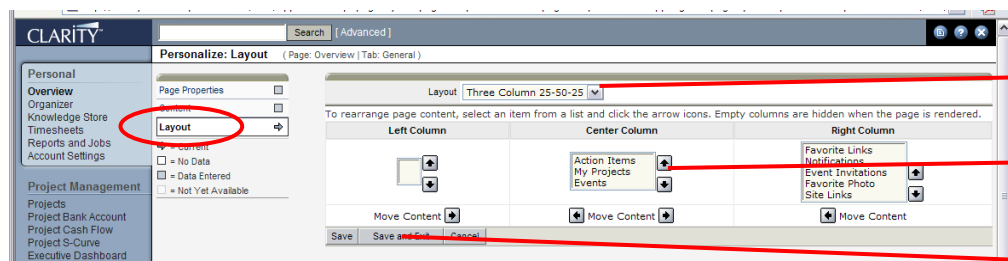
On the 'Content' page you can see what portlets are currently displayed on the personal page. Press 'Add' to extent with more portlets.

The following portlets are some of those that can be added to the personal page:

- **Favourite Links:** You can add a set of shortcuts (hyperlinks) to enable the user to navigate to any page inside or outside the Clarity environment. Select this option if you want this set of links

to appear on your personal page. Press the button *'Manage Links'* to add the URL's of the sites you require.

- **Favourite Photo:** This option enables the user to make the home page more personal by adding a personal photograph.
- **My Projects:** Select if a set of your 'favourite' projects should appear on your personal page. When this option is selected, individual projects need to be assigned as your favourite project. Refer to paragraph 6.2.
- **My Reports:** Select if a set of your 'favourite' reports should appear on your personal page. When this option is selected, individual reports with predetermined parameters need to be defined as your favourite report.
- **Notifications:** Select if you want the special notifications box to appear on your personal page. This box gives a list of shortcuts to most of the 'alerts' available in the system.
- **Site Links:** This is a set of hyperlinks that has been defined by the system administrator.
- **Timesheets to Approve:** A list of timesheets that are waiting to be approved.



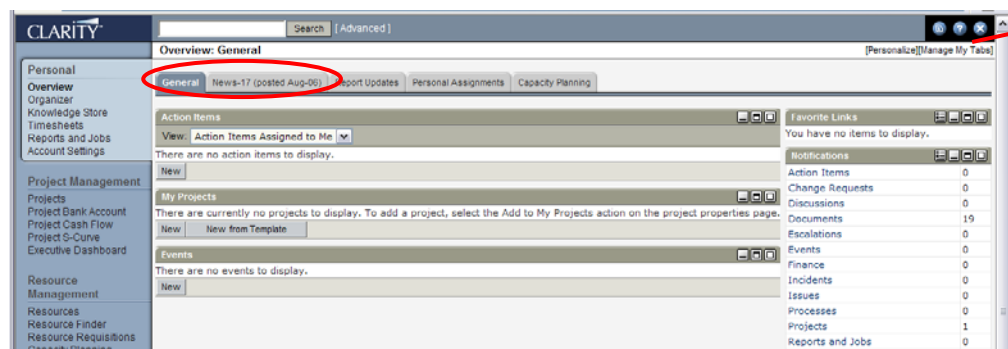
To personalize the layout, select the:

- Number of columns on the page
- What information required to be displayed in which column.

Press *'Save and Exit'* to accept the setting and return to the home page.

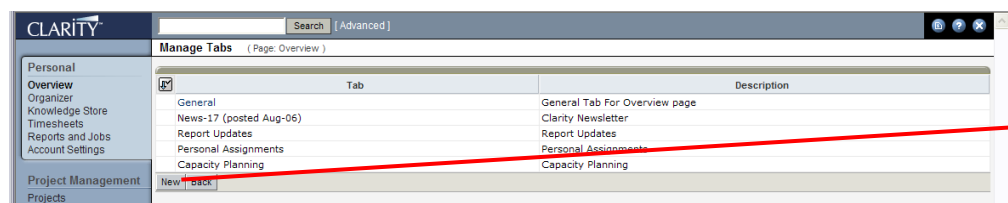
2.6 Manage tabs

It is also possible to create multiple tabs on the personal page. By default, there is always one tab configured, named 'General'. If multiple tabs are created, all the information items as described on the previous pages can then be divided over multiple screens.

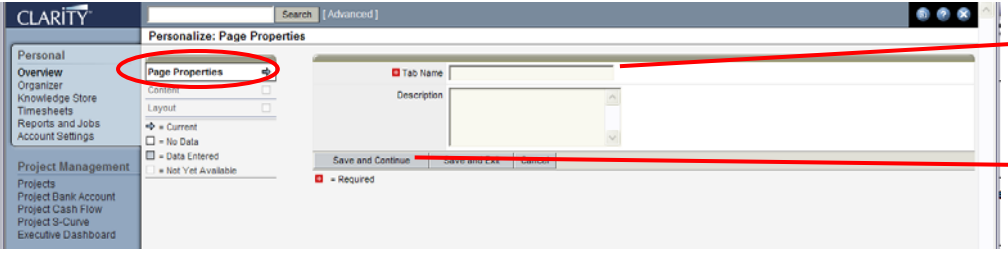


Press *'Manage Tabs'* to add extra tabs on the personal page.

The 'News' tab is a tab created by the system administrator to inform users about the latest Clarity developments.



Press *'New'* to create an extra tab.



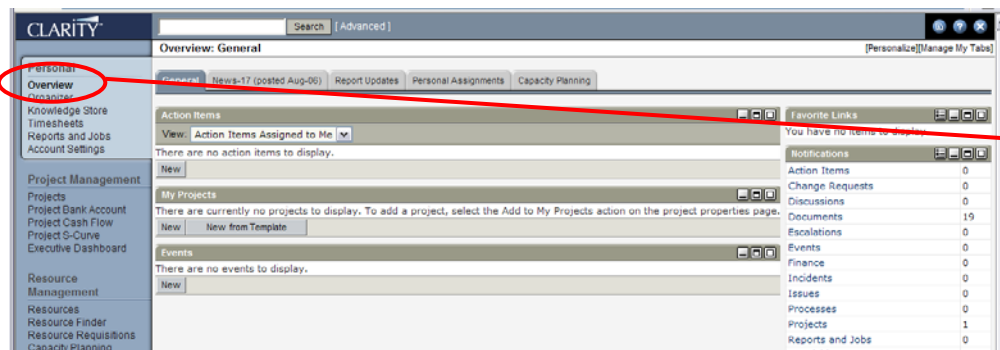
Enter a unique ID for this new tab.

Press 'Save and Continue' to configure this new tab.

Configuring the content and layout of this tab is identical to the configuration of the 'General' tab, see previous paragraph.

3 THE PERSONAL MENU

3.1 Overview



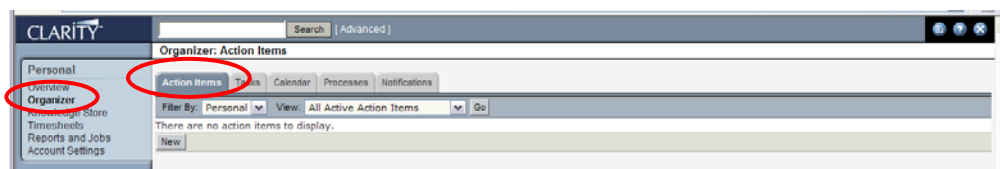
The personal menu is available for all users.

The 'Overview' link will always guide the user back to the home page.

3.2 Organizer

In the organizer menu, the user has the possibility to manage his work by defining action items, events and by maintaining a personal calendar. The functionality of this menu is similar to the calendar, events and tasks in MS Outlook, and is therefore not discussed in detail here.

3.2.1 Action Items



On the action items tab you can create and update Action Items (To-Do's).

Functions on this tab are:

- **Filter By:** You can filter on 'Personal' which will give you all general actions assigned to you in the organizer menu, or by Project which will give you the actions assigned for a specific project.
- **View:** Select the Action Items by status.
- **New:** Create new actions for yourself or assign new actions to other users.
- **Status:** Update the status of an action.

3.2.2 Tasks

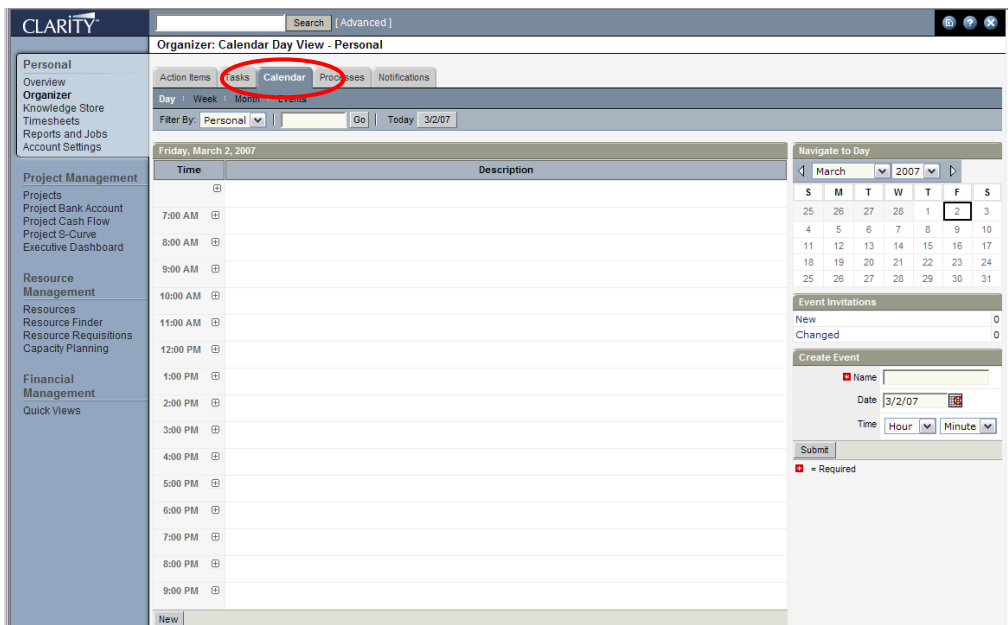
On the tasks tab, all the project tasks that are assigned to this user are listed. These tasks can be sorted by status and/or by project. Budget and schedule details for each task are shown.



On the Tasks tab you can see the project tasks (work packs) that are assigned to you.

3.2.3 Personal Calendar

The personal calendar in the Clarity organizer menu is the calendar of the user. There is also a resource calendar available in the system that will be maintained by the Resource Manager of that particular resource. The resource calendar is used to plan the resource availability and will affect the project schedule, where this personal calendar will not have any impact on the resource availability.



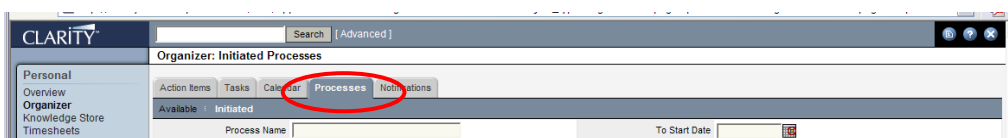
From the calendar page, you can select Day-, Week- or Month view; you can add Events.

Events will be displayed in the personal calendar of all participants.

If you schedule an event with a user in a different time zone, Clarity will calculate the correct local time for this user, assuming that both users have set their time zones correct, refer to par. 3.6.1

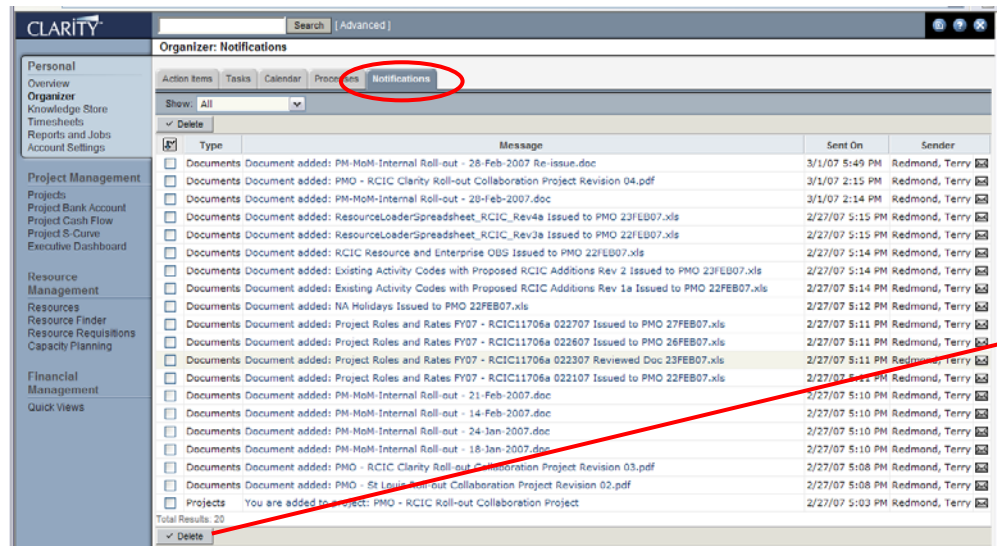
3.2.4 Processes

Since processes are currently not part of the primary functionality of the tool, this is not further detailed in this manual. However, you can use and create processes if you want to.



3.2.5 Notifications

The notifications tab is the area where all 'alerts' can be viewed. See paragraph 3.6.3 for an overview of all notifications.



If you have seen the notification, you can delete the messages from here.

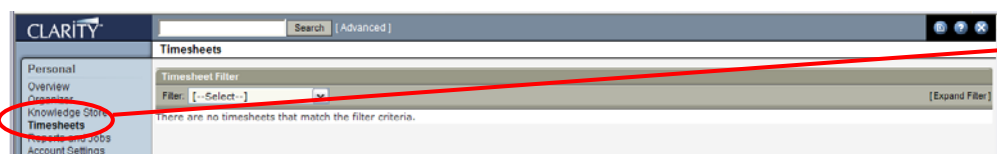
3.3 Knowledge Store

This section is no longer used by the Project Management Office to store documents such as templates, generic documentation, user manuals, etc. These documents are now located in the 'ProcessWorld', 'Project Management Processes' area of the PMO website.



3.4 Timesheets

To be able to use the timesheet menu in Clarity, you must be configured in Clarity as a resource, and your manager must have enabled you to book time. If these conditions are true, the 'Timesheets' option displays in the Personal Menu.

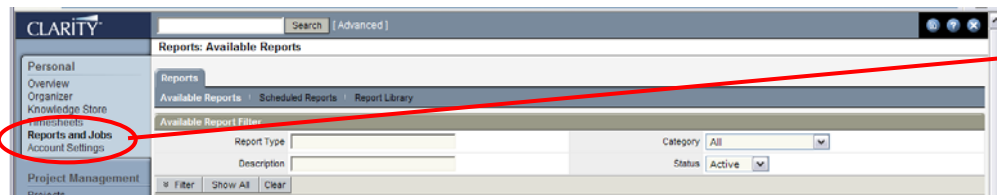


The timesheet option in the Personal Menu.

Selecting this option will enable the user to enter and submit his timesheets. This is in detail described in chapter 4.

3.5 Reports and Jobs

The reporting module in Clarity provides a tool to run electronic reports. How to use the Reports and Jobs menu is described in chapter 5.



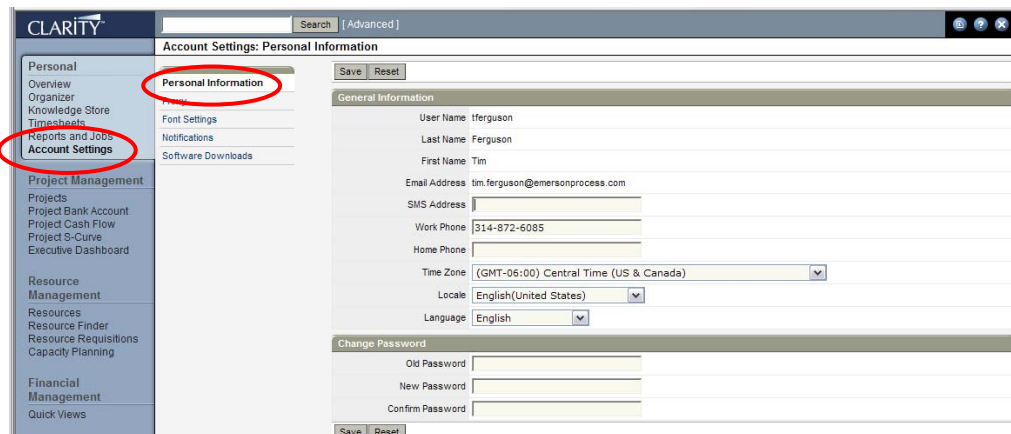
The 'Reports and Jobs' option in the Personal Menu.

3.6 Account Settings

The account settings menu contains some important settings that are required for the user to operate the system properly and which do affect system operation. This set-up is normally only required once, when you start using the system for the first time.

3.6.1 Personal information

The first page of the Account Settings menu is used to define personal information and information about the location of the resource:



Select 'Account Settings' to set-up the system for your personal use.

General information:

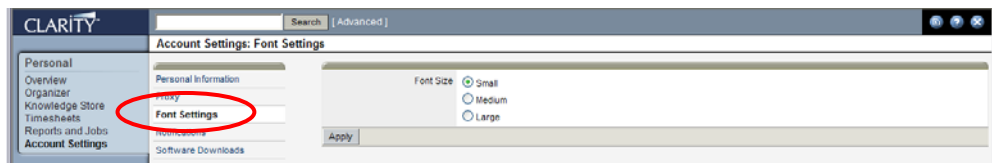
- **User Name:** This is the user name as used for login, and is shown for information only.
- **Last Name and First Name:** These default from the user set-up as done by the system administrator. If you wish to have your name changed for whatever reason, contact your Resource Manager who can edit these properties on your behalf.
- **SMS address:** Not used in the current configuration of the system, leave blank.

- **Email Address:** If you select that you want to receive notifications via Email (see paragraph 3.6.3) this is the address where the notifications are sent to.
- **Phone Numbers:** These fields are for information only.
- **Time Zone:** Select in which time zone you are. This setting is e.g. used to calculate the local time if events are scheduled with participants from different time zones.
- **Locale:** This selection is used to set a number of local settings, and determines how the date format is shown. To avoid any confusion between American and European time format this option is mandatory to set correctly.
Note: you still have to set your 'Regional Settings' in the Windows / Settings / Control Panel menu to have the correct date format at all the screens.
- **Language:** Set the language to be used for all the Clarity screens and menus.

Change Password:

- **Password fields:** Retype the current valid password, and enter the new required password in both the 'New Password' and 'Confirm Password' fields. When you press 'Save' the password will be changed.
Note: Passwords are case sensitive. Username and password cannot be identical. The minimum number of characters in a password is 5. Old and new password cannot be the same.

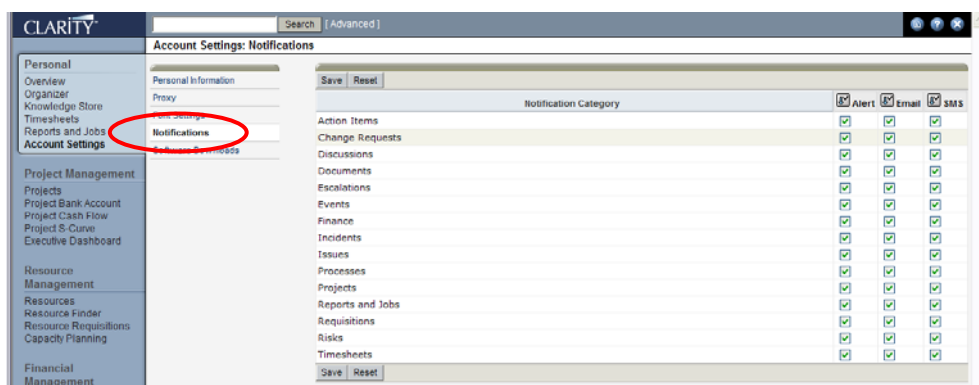
3.6.2 Font Size



This option can be used to change the font size that is used on all the normal Clarity screens.

3.6.3 Notifications

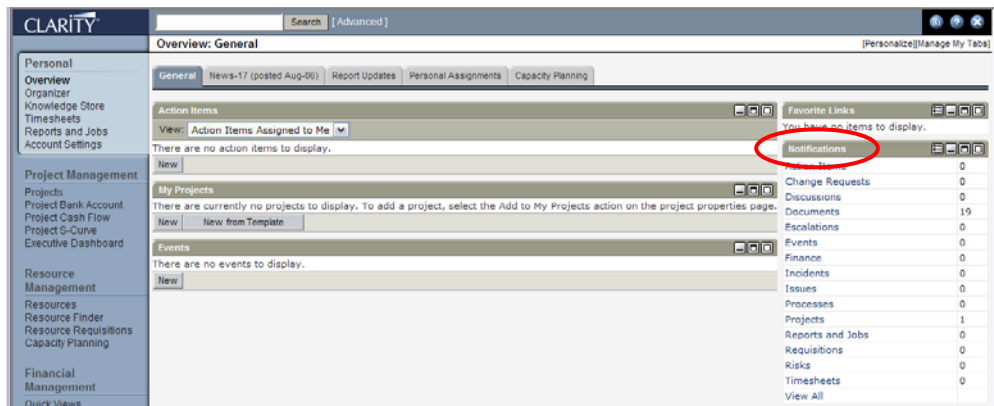
Within Clarity, there are several processes that can generate notifications ('alerts') to the user.



Set the notifications preferences.

This menu can be used to determine how the user wants to receive these notifications. When you select Email, you will receive an automatic email anytime when an alert is triggered. When you select Alert, you will see these in the notification summary area on your personal page, but you will not pro-actively be informed.

When you are not a frequent user of Clarity, you can best set your preference to E-mail. When you are a frequent user of Clarity or do receive a lot of notifications, you can best set your preference to 'Alert'. However, make sure that you have added the 'Notifications' Portlet to the personal page.



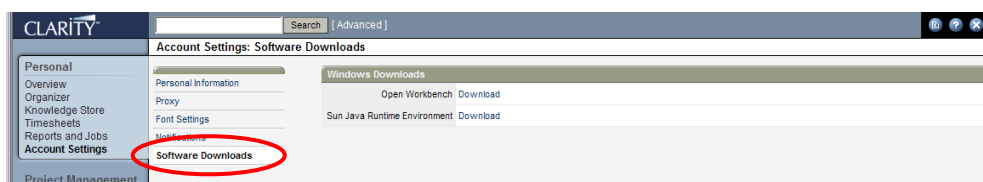
This is the notifications Portlet on the Personal Page, where a summary of the notifications is listed when you select 'Alert'.

These notifications are generated from different modules in Clarity that will be explained in other sections of the user manuals:

- **Action Items** and **Events**: these are created in the Organizer (see paragraph 3.2.5)
- **Discussions**: these are items generated on the topics/discussions module of a particular project (see paragraph **Error! Reference source not found.**).
- **Documents**: these are notifications generated when e.g. a document has been added to your project.
- **Projects**: this indicates that you have been assigned to a project as a participant (refer to chapter 6) or other project activities have been assigned to you.
- **Report and Jobs**: this indicates that a report that you have executed is either completed or aborted due to a failure.
- **Timesheets**: this indicates that you have a timesheet waiting for your action.

3.6.4 Software Downloads

The software downloads page can be used to download all available client applications. All packages are downloaded as executable installation file, that need to be downloaded and stored on a temporary location on the local computer, and then the executable shall be run from there.



Click on the 'Download' field to download this installation file to your local computer or network.

Available client applications are:

- **Open Workbench**: this is the scheduling tool, required for project managers, planners, and project engineers. This is a certified copy from Clarity and should be the only one used for Emerson Process Management Schedules.

- **Java Runtime Environment:** This is only required for Workbench users. Download the international version to ensure that regional settings are taken into account.

For details on installation of this software please refer to the *Clarity User Set-Up - Client Software Installation document*. This document describes the set-up of the local computer for the correct operation of Clarity.

The latest versions of the document can be retrieved from the 'ProcessWorld' – 'Project Management Office' 'Processes' website:

4 TIMESHEETS

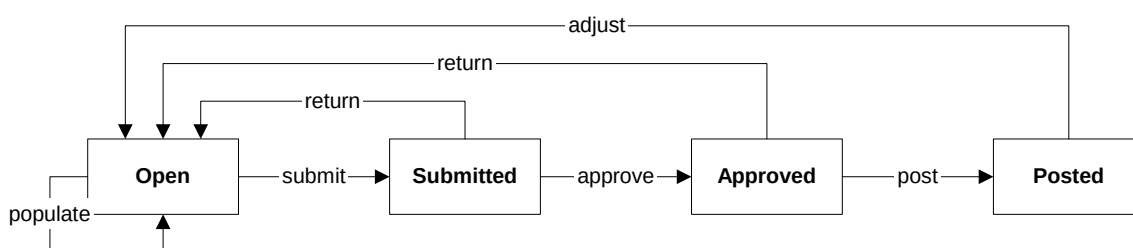
4.1 Time Reporting Process

Within Clarity, the time reporting process will be as follows:

- A time period first has to be created by the Clarity System Administrator. A timesheet period is always 1 week: starting on **Saturday** and ending by **Friday**. Once a time period has been created, then the user will be able to see the corresponding timesheet for this period. The initial status of this timesheet is '**Open**'.

Normally there are about 6-8 timesheets available for a user: this week's timesheet and approximately 2-4 periods in the past and 2-4 periods in the future.

- A user then '**populates**' the timesheet. This status of a timesheet remains '**Open**', but the system will search the database for any scheduled work in that period, and automatically populates the timesheet with all these work packs.
- The user can then start booking time to activities on the timesheet. The timesheet can be saved to store the data as entered on the timesheet, but this does not change the status of a timesheet or submit the timesheet.
- After the user is convinced that all information on the timesheet is correct, they can 'submit' the timesheet for approval. The status of the timesheet will go to '**Submitted**'.
- The resource manager can review the timesheet and 'approve' the timesheet. The status will then go to '**Approved**'. However, the resource manager can also 'reject' the timesheet. The status of the timesheet will then go back to '**Open**' and needs to be resubmitted for approval by the resource after the corrections has been made.
- When a timesheet has been approved, the timesheet will be 'posted'. This is a process initiated by the Clarity System Administrator, two times every week (on Wednesday and Thursday at 12:00 hours CET). The status of the timesheet will change to '**Posted**' and actual hours will be booked to the project and cost will be transferred to JDEdwards/**Oracle**.



- Once all timesheets of a particular time period have been posted for a period of three months, the Clarity System Administrator will close the time period. All timesheets from this period are no longer available in the Timesheet pages for viewing or modifications.

Note: A closed time period in Clarity can be re-opened by the system administrator on request, so it is always possible to make historic corrections if required.

If a timesheet has been posted, there is still an option to make modifications to this timesheet. This process is called an **adjustment**, and the following procedure applies:

- If an adjustment is initiated, a copy of the timesheet will be created with the status '*Open*', the original timesheet remains in the overview with the status '*Posted*'.
- The new timesheet (the 'adjustment' timesheet) needs to be re-submitted for approval by the resource after the corrections have been made.
- An 'adjustment' timesheet can also be deleted if a correction is no longer required, since the original timesheet has already been posted and hours/cost is already booked.
- If an 'adjustment' timesheet gets submitted, approved, and posted again, this will cause the system to post two timesheets: a 'credit' for the original timesheet, and a 'debit' for the new, corrected timesheet. The status of the old posted timesheet will then be marked as '*Adjusted*', and the status of the new timesheet will then become '*Posted*'.
- This adjustment process can be repeated as many times are required.
- Note: since this action causes a correction also to the JDE/Oracle financials, this should not be done without prior approval of the resource manager.

4.2 Types of Time booking

There are different types of time booking possibilities:

Hours booked to projects. These include:

- Hours booked to a 'normal' customer project.
- Hours booked to Overhead projects that include NO_AVAIL, COST_TX, INTERNAL and SALES.

4.3 Timesheet List

When the Timesheet menu is selected, the following screen will appear:

Period Start	Timesheet Status	Adjusted	Adjustment	Total
4/28/07	Open			
5/5/07	Open			
5/12/07	Open			
5/19/07	Open			

Total Results: 4

Submit for Approval

Labor and Equipment Work Effort = Hours

The timesheets menu.

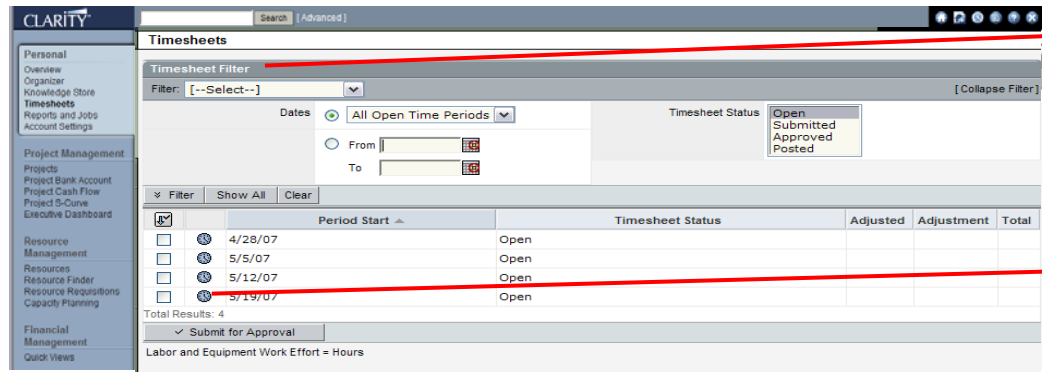
Use the '*Expand Filter*' option to define a selection of timesheets that shall be shown on this page.

By default, the timesheet page lists all the open timesheets that are available to work on. However, there is an expanded filter available to define a selection of timesheets that will be shown.

Filter options are:

- **Dates:** Default is to show all timesheets from all open periods. You can select to show the 'overdue' timesheets only, or make your own selection. Only the open time periods are available.

- **Timesheet Status:** You can select from the list what timesheets shall be shown. You can select one status or a combination of statuses. Use the Ctrl- and Alt-keys to select a combination of statuses from the list.



The expanded timesheet filter: make a selection based on time period or based on timesheet status.

Click on the clock icon to open the timesheet detail page.

In the list of timesheets, the following information is given for each timesheet:

- **Period Start:** the timesheet period is always a weekly period, from **Saturday to Friday**, so this is the Monday of that particular week.
- **Timesheet status:** The status of that particular timesheet. The status can be 'Open', 'Submitted', 'Approved', or 'Posted'. Refer to paragraph 4.1 for the timesheet flow.
- **Adjusted:** This field shows a tick-mark if this is a previously 'Posted' timesheet, but that has been 'replaced' by a later posted adjustment. This is for historical review only, since this timesheet has been credited in the system.
- **Adjustment:** This field shows a tick-mark if this is a new 'Open' timesheet that is an active adjustment of an earlier posted timesheet.
- **Total:** Total hours entered on this timesheet.

From the timesheet list, the following actions can be executed:

- **Submit for Approval:** Select an 'Open' timesheet from the list and submit this timesheet for approval. However, from this overview screen the timesheet content cannot be viewed. There is also an approval button on the timesheet detail page.
- **Return Timesheet:** Select a 'Submitted' or 'Approved' timesheet from the list if this timesheet needs to be modified.
- **Delete Adjustment:** Select an adjustment timesheet and delete this adjustment, which implies that no changes will be made for this timesheet and the original posted timesheet will remain as it is.
- **Open a Timesheet:** Click on the 'clock' icon to open the timesheet detail page for this timesheet.

4.4 Fill the Timesheet with Tasks

4.4.1 Populate the Timesheet

When a timesheet is accessed for the first time, the following page will display:

The screenshot shows the Clarity Timesheet interface. At the top, there are buttons for 'Submit for Approval', 'Populate', 'Notify', and 'Cancel'. Below these, the 'Time Period' is set to '03/03/07 - 09/03/07' and the 'Resource Name' is 'Redmond, Terry'. The 'Timesheet Status' is 'Open'. The main table has columns for Project ID, Task ID, Task/Description, Charge Code, Type Code, Overtime Code, Shift Code, and days of the week (Sat, Sun, Mon, Tue, Wed, Thu, Fri). The 'Total' row shows all zeros. A red arrow points from the 'Populate' button to a text box on the right.

Initial view: empty timesheet.

Populate the timesheet.

When pressing the 'Populate' button, the system will check the database and add all planned work for this week, as well as any planned work for the prior week and the next week onto the timesheet. The populate function will also add all relevant codes to the timesheet.

The screenshot shows the Clarity Timesheet interface after it has been populated. The 'Time Period' is still '03/03/07 - 09/03/07' and the 'Resource Name' is 'Terry Redmond'. The 'Timesheet Status' is 'Open'. The main table now contains several rows of data, including 'Non-paid absence', 'Lieu Time (Compensation)', 'Personal Holiday', 'Compensation', 'Sickness', and 'Statutory Holiday'. The 'Total' row shows values for each day of the week. A red arrow points from the 'Save' button to a text box on the right.

The timesheet after it has been populated.

Always 'Save' the timesheet after each modification.

Once a timesheet has been populated with tasks, any changes made to a project schedule will not automatically be reflected in the timesheet. However, you can repopulate a timesheet. In this case, any changes from the project schedules will be updated on the timesheet. This can cause data already entered on the timesheet to be deleted!

*** This method of populating a timesheet can be confusing if the resource is allocated and assigned on many projects. It is therefore sometimes recommended to use an alternative method to add tasks to your timesheet, see the next section....**

4.4.2 Add extra Tasks to the Timesheet

If a resource has worked on another task on which they were not scheduled in that particular period, this task can be manually added to the timesheet. However, the resource can only add tasks to the timesheet from projects that they are allocated to.

CLARITY

Timesheet

Save Submit for Approval Populate Notify Cancel

Time Period: 03/03/07 - 09/03/07

Resource Name: Terry Redmond

Modified by: Terry Redmond

Last Modified: 12/03/07 09:47

Timesheet Status: Open

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Overtime Code	Shift Code	Sat 03/03	Sun 04/03	Mon 05/03	Tue 06/03	Wed 07/03	Thu 08/03	Fri 09/03	Sat 10/03	Sun 11/03	ETC
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0092	Non-paid absence	0092	Normal Rate												0.00
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0015	Lieu Time (Compensation)	0015	Normal Rate												0.00
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0012	Personal Holiday	0012	Normal Rate												0.00
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0091	Compensation	0091	Normal Rate												0.00
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0014	Sickness	0014	Normal Rate												0.00
44FY07-PSG-NO_AVAIL	LE - UK - Non-Available time FY07	0011	Statutory Holiday	0011	Normal Rate												0.00
Total																	
0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00																	

Add Task Split Delete

Save Submit for Approval Populate Notify Cancel

Work Effort = Hours

To add extra tasks, press the button 'Add Task' from the timesheet detail page.

The result is a new page with a list of all tasks that can be added to the timesheet. Use the filter options to find the task(s) to be added:

CLARITY

Select Tasks (Resource: Redmond, Terry Time Period: 03/03/07 - 09/03/07)

Task Filter

Group By: None

Task Name:

Task ID:

Show Tasks: Assigned

Task Status: Open

Project Name:

Project ID:

Project	Project ID	Task	Task ID	Task Start	Task Finish	Status
LE - UK - Non-Available time FY07	44FY07-PSG-NO_AVAIL	Permitted Absence	0013	02/10/06	28/09/07	Started
LE - UK - Projects Group - General Overhead Time FY07	44FY07-PSG-DGO-PR	Enterprise Estimating Tool Training (EET)	0031.06	02/10/06	28/09/07	Started
LE - UK - Projects Group - General Overhead Time FY07	44FY07-PSG-DGO-PR	Clarity & Workbench Training	0031.10	02/10/06	28/09/07	Started
LE - UK - Projects Group - General Overhead Time FY07	44FY07-PSG-DGO-PR	Management - Terry Redmond - Planning Manager	0034.005	02/10/06	28/09/07	Started

Total Results: 4

Add Add and Select More Cancel

The task Filter, to find the appropriate task(s).

The available filter options are:

- **Group By:** Select 'none' to get a flat list of all tasks where this resource can charge time to, or select 'Task Hierarchy' to get a structured list, grouped by project and then by the Work Breakdown Structure.
- **Task Name or Task ID:** Filter the task list based on the task name (the description in the planning) or the task ID (the WBS code).
- **Show Tasks:** Select to show 'All' tasks, the 'Assigned' tasks (the tasks that this resource is already assigned to work on) or the 'Not Assigned' tasks (tasks that are not planned for this resource).
- **Task Status:** Select to show 'All' tasks, only the 'Open' tasks (tasks that are not yet reported as completed and where the ETC > 0) or only the 'Completed' tasks (tasks that are reported as completed and where the ETC = 0).
- **Project Name or Project ID:** Filter the task list based on project characteristics.

Select Tasks (Resource: Redmond, Terry; Time Period: 03/03/07 - 09/03/07)

Task Filter: Group By: None, Task Name: , Task ID: , Task Status: Open, Project Name: , Project ID:

Show Tasks: Assigned

Project	Project ID	Task	Task ID	Task Start	Task Finish	Status
LE - UK - Non-Available time FY07	44FY07-PSS-NO_AVAIL	Permitted Absence	0013	02/10/06	28/09/07	Started
LE - UK - Projects Group - General	44FY07-PSS-DGO-PR	Enterprise Estimating Tool Training (EET)	0031.06	02/10/06	28/09/07	Started
LE - UK - Projects Group - General	44FY07-PSS-DGO-PR	Clarity & Workbench Training	0031.10	02/10/06	28/09/07	Started
LE - UK - Projects Group - General	44FY07-PSS-DGO-PR	Management - Terry Redmond - Planning Manager	0034.005	02/10/06	28/09/07	Started

Buttons: Add, Add and Select More, Cancel

To add the tasks, select the task(s) and press 'Add' or 'Add and Select More'.

This list of tasks will only contain tasks from projects where this resource has been allocated. If the user has the right to book support activities to other departments or to internal projects, these tasks from these (cost centre) projects will also appear in the same task list. Booking to one of these tasks is identical as booking to a customer project.

4.5 Enter Time on the Timesheet

4.5.1 Enter time for Projects and Support Activities

Once the timesheet is populated with the correct tasks, the tasks are sorted in alphabetical order and the following information is automatically available at the task level:

Timesheet

Buttons: Save, Submit for Approval, Populate, Notify, Cancel

Time Period: 03/03/07 - 09/03/07

Resource Name: Terry Redmond, Modified by: Terry Redmond, Timesheet Status: Open, Last Modified: 12/03/07 09:47

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Overtime Code	Shift Code	Sat 03/03	Sun 04/03	Mon 05/03	Tue 06/03	Wed 07/03	Thu 08/03	Fri 09/03	Total	ETC	Posted Actuals	Baseline
44FY07-PSS-NO_AVAIL	LE - UK - Non-Available time FY07	0092	Non-paid absence	0092	Normal Rate										0.00	0.00	0.00	0.00
44FY07-PSS-NO_AVAIL	LE - UK - Non-Available time FY07	0015	Lieu Time (Compensation)	0015	Normal Rate										0.00	0.00	0.00	0.00
44FY07-PSS-NO_AVAIL	LE - UK - Non-Available time FY07	0012	Personal Holiday	8999	Normal Rate										0.00	180.00	7.50	0.00

Invalid!

- **Project ID and Project:** The project number and name. This is normally the JDE number for customer projects; the sales cost centre number for sales support activities or any reference for internal projects.
- **Task ID:** The WBS code of this task.
- **Task Description:** The description of the task (the task name in the Workbench project schedule).
- **Charge Code:** This code defines the activity type of this task, which is an Emerson specific code. This field is normally pre-populated from the Workbench plan. This field can be changed (not recommended), but shall never be deleted. (this field may be hidden from view, to see the field you can add it to the timesheet by selecting the 'Configure' button).

! Important

In Clarity, each hour booking requires an activity code to create a successful transaction to JDE/Oracle. Therefore, ensure this field has a correct value before submitting the timesheet for approval.

! Important

Code '9999' is not a valid activity code. Let your Project Manager define a correct, valid code before submitting the timesheet for approval.

- **Type Code:** This field is to indicate if premium rates need to be applied for this particular task. This can be either used for overtime charges, indication of special time, or other supplemental rates that need to be applied.

! Important

In Clarity, each hour booking requires a type code to create a successful transaction to JDE/ORACLE. Therefore, ensure this field has a valid value before you submit.

! Important

The '*BCEC Deputation*' code shall only be used by BCEC resources! Check with your local champion or Resource Manager the local definition on when to use what type code.

! Important

The '*BCEC Site Work*' code shall only be used by BCEC resources! Check with your local champion or resource manager the local definition on when to use what type code.

! Important

The '*Travel Time*' code is for those resources that travel to site at different rates than when at site. Check with your local champion or Resource Manager the local definition on when to use what type code.

- **Days of the Week:** Here the actual worked hours can be entered. If the cursor is moved to a field in this column, the number of hours that were scheduled for that particular task that day is shown. There is no restriction to the number of hours that can be entered per day or per task.
- **Total:** The total number of hours booked for this task this week. This is the sum of all the days' columns. If the total hours booked on this task are entered in this field, the hours get evenly spread over the days in that week.
- **Posted Actuals:** This field shows the number of hours already booked to this task.
- **ETC:** This column shows per default the 'Estimated hours To Complete' for this task. Any hours booked to this task will automatically be subtracted from the original value. **This value can be (shall be) overwritten if the user wants to feedback his progress to the Project Manager of this project, in case the estimated work left is not identical to the calculated value.**
- **Baseline:** This field shows the number of hours that are budgeted for this task.

4.5.2 Enter Overtime or Special time: Split Tasks

Overtime or special time is booked to the same tasks as normal time, but with a different type code. If you want to book 8 hours of normal time and 2 hours overtime, you have to 'split' the task in two lines, to enable you to enter separate type codes on each line.

CLARITY Timesheet

Save Submit for Approval Populate Notify Cancel

Time Period: 03/03/07 - 09/03/07

Resource Name: Terry Redmond

Timesheet Status: Open

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Overtime Code	Shift Code	Sat 03/03	Sun 04/03	Mon 05/03	Tue 06/03	Wed 07/03	Thu 08/03	Fri 09/03	Total	ETC							
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0092	Non-paid absence	0092	Normal Rate										0.00	0.00							
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0015	Lieu Time (Compensation)	0015	Normal Rate										0.00	0.00							
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0012	Personal Holiday	0015	Normal Rate										0.00	180.00							
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0015	Lieu Time (Compensation)	0015	Normal Rate										0.00	0.00							
Total																0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Add Task Split Delete

Save Submit for Approval Populate Notify Cancel

Select the task to split, and then press 'Split'.

This will create an extra, identical line for this task.

CLARITY Timesheet

Save Submit for Approval Populate Notify Cancel

Time Period: 03/03/07 - 09/03/07

Resource Name: Terry Redmond

Timesheet Status: Open

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Overtime Code	Shift Code	Sat 03/03	Sun 04/03	Mon 05/03	Tue 06/03	Wed 07/03	Thu 08/03	Fri 09/03	Total	ETC						
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0092	Non-paid absence	0092	Normal Rate										0.00	0.00						
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0015	Lieu Time (Compensation)	0015	Normal Rate										0.00	0.00						
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0012	Personal Holiday	0015	Normal Rate	OT, 1.0		1							0.00	180.00						
44FY07-PS5-NO_AVAIL	LE - UK - Non-Available time	0015	Lieu Time (Compensation)	0015	Normal Rate										0.00	0.00						
Total																0.00	0.00	0.00	0.00	0.00	0.00	0.00

Add Task Split Delete

Save Submit for Approval Populate Notify Cancel

Now select the new type code for this line and enter the number of hours to be booked with this type code.

4.6 Timesheet Notes

There are two different types of notes that can be added to the timesheet:

- Timesheet Notes: these are notes at the timesheet level, available for the user and the resource manager, normally with resource related information.
- Time Entry Notes: these are notes at the task level, normally with project related information.

The screenshot displays the 'Timesheet' window for user Terry Redmond. It features a table with columns for Project ID, Task ID, Task Description, Charge Code, Type Code, Overtime Code, Shift Code, and a weekly grid from Saturday to Friday. Two tasks are listed: '44FY07-LE - UK - NO_AVAIL time' and '44FY07-LE - UK - NO_AVAIL time'. Red arrows point from callout boxes to specific icons in the interface. One arrow points to a notepad icon in the task row, with a callout box stating: 'Click here to add a **time entry** note for this specific task.' Another arrow points to a notepad icon in the timesheet header area, with a callout box stating: 'Click here to add a **timesheet** note.'

Below the main window, two smaller screenshots show the note entry forms. The left one is titled 'Time Entry Notes' and the right one is titled 'Timesheet Notes'. Both forms have a 'Note' text area, a 'Category' dropdown, and an 'Add' button. The 'Timesheet Notes' form also includes a 'Close' button and a 'Required' checkbox.

Timesheet notes and Time entry notes do have the same format. You can enter multiple notes for each timesheet or each time entry.

If a note has been added, the appearance of the notes icon will change from  to  to indicate that a note has been added.

4.7 Send and Retrieve a Timesheet

4.7.1 Submit the Timesheet for Approval

When all timesheet data is entered correctly, the timesheet can be submitted for approval. This is a single action from the timesheet detail page. The status of the timesheet will be updated to 'Submitted', and is now available for the Resource Manager to approve.

CLARITY Search [Advanced]

Timesheets

Save Submit for Approval Populate Notify Cancel

Time Period: 03/03/07 - 09/03/07 Modified by: Terry Redmond Last Modified: 12/03/07 10:01

Resource Name: Terry Redmond Timesheet Status: Open

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Overtime Code	Shift Code	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Total	ETC
44PY07-PSS-NO_AVAIL	LE - UK - Non-Available time	0092	Non-paid absence	0092	Normal Rate										0.00	0.00
44PY07-PSS-NO_AVAIL	LE - UK - Non-Available time	0015	Liku Time (Compensation)	0015	Normal Rate										0.00	0.00
44PY07-PSS-NO_AVAIL	LE - UK - Non-Available time	0012	Personal Holiday	0015	Normal Rate	OT_1.0						1	1		0.00	180.00
44PY07-PSS-NO_AVAIL	LE - UK - Non-Available time	0015	Liku Time (Compensation)	0015	Normal Rate										0.00	0.00
Total								0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Add Task Split Delete

Save Submit for Approval Populate Notify Cancel

Submit the timesheet for approval.

The action 'Submit for Approval' will also automatically save all the changes that are made to the timesheet data.

4.7.2 Overtime and Shift Codes

When resources submit their timesheet, each line item on the timesheet will be checked. If on a particular project an invalid overtime or shift code is used, then the timesheet will be immediately returned after submission. An invalid code is any overtime or shift code that is not selected (enabled) on the new project "Valid Timesheet Codes" page.

A returned timesheet is clearly visible for the resource in the timesheet overview page:

CLARITY Search [Advanced]

Timesheets

Timesheet Filter

Filter: [--Select--] [Collapse Filter]

Resource Name: Laird Resource ID: Resource Status: Active Type: All OBS Unit: My Rights: Approve Total: to

Dates: All Open Time Periods From To Timesheet Status: Open Submitted Approved Posted Adjustment Views: All

Filter Show All Clear

Resource	ID	Period Start	Timesheet Status	Adjusted	Adjustment	Total
Laird, Sandra	SL_SL_01	9-6-07	Returned			12.00
Laird, Sandra	SL_SL_01	16-6-07	Open			
Laird, Sandra	SL_SL_01	23-6-07	Open			

Total Results: 3

Submit for Approval Notify

Labor and Equipment Work Effort = Hours

The user can then open the timesheet again. When the timesheet is returned, the system automatically creates a timesheet note to inform the resource why the timesheet has been returned, and for which project an invalid code was selected. Open the timesheet note by clicking on the notes icon:

Timesheet

Save Submit for Approval Populate Notify Cancel [Printable Version]

Time Period: 9-6-07 - 15-6-07

Resource Name: Sandra Laird Modified by: Reinier Noppers

Timesheet Status: Returned Last Modified: 15-6-07 10:05

Project ID	Project	Task ID	Task Description	Type Code	Overtime Code	Shift Code	Sat 9-6	Sun 10-6	Mon 11-6	Tue 12-6	Wed 13-6	Thu 14-6	Fri 15-6	Total	ETC	Posted Actuals	Baseline
3053466	LSFB Arngen Fremont Study 3053466	01A.09	Traceability Matrix	Normal Rate	OT_2.0	Shift_Code_4	4,00	4,00	4,00					12,00	0,00	0,00	0,00
3058289	RCIC - Non Available Time 3058289	0011.19	19 - Personal Holiday	Normal Rate	OT_1.5	Shift_Code_5								0,00	0,00	0,00	0,00
3058289	RCIC - Non Available Time 3058289	0011.08	08 - Holiday	Normal Rate	OT_1.4	Non Billing								0,00	0,00	0,00	0,00
Total							4,00	4,00	4,00	0,00	0,00	0,00	0,00	12,00			

Add Task Split Delete [Configure]

Save Submit for Approval Populate Notify Cancel [Printable Version]

The notes window will pop-up and shows the reason for the rejection and the project ID of the project that caused the issue:

http://devclarity.emersonprocess.com - Clarity :: Timesheet Notes - Microsoft Inter...

CLARITY

Timesheet Notes (Resource: Laird, Sandra | Time Period: 9-6-07 - 15-6-07)

Note

Category

Add

Note	Category	Author	Date and Time
Your Timesheet has been automatically rejected as a result of either an incorrect Overtime Code or Shift Code on project 3058289.	Automatic Timesheet Rejection	Niku Z_Administrator	15-6-07 10:05

Delete Close

* = Required

The user now has to make the necessary correction: either change the overtime or shift code on the timesheet (in case an incorrect code was used), or request the PM or the PA to enable this code on the project (in case the code was correct but not enabled). In both situations, the timesheet shall be resubmitted by the resource.

4.7.3 Return a Timesheet

After submission, the timesheet can be retrieved and modified, until the posting has taken place. Timesheets already approved by the Resource Manager can also be returned, but do require a new approval.

CLARITY Search [Advanced]

Timesheets

Timesheet Filter: Fredmond*

Resource ID: [Active]

Type: All

OS Unit: [My Rights]

Approve: [is]

Adjustment Views: All

Timesheet Status: Open, Submitted, Approved, Posted

Resource	ID	Period Start	Timesheet Status	Adjusted	Adjustment	Total
Redmond, Terry	LE_TR_01	08/01/07	Open			
Redmond, Terry	LE_TR_01	15/01/07	Open			
Redmond, Terry	LE_TR_01	20/01/07	Open			
Redmond, Terry	LE_TR_01	27/01/07	Open			
Redmond, Terry	LE_TR_01	03/02/07	Open			
Redmond, Terry	LE_TR_01	10/02/07	Open			
Redmond, Terry	LE_TR_01	17/02/07	Open			
Redmond, Terry	LE_TR_01	24/02/07	Open			0.00
Redmond, Terry	LE_TR_01	03/03/07	Submitted			32.00
Redmond, Terry	LE_TR_01	10/03/07	Open			
Redmond, Terry	LE_TR_01	17/03/07	Open			6.00
Redmond, Terry	LE_TR_01	24/03/07	Open			
Redmond, Terry	LE_TR_01	31/03/07	Open			
Redmond, Terry	LE_TR_01	07/04/07	Open			
Redmond, Terry	LE_TR_01	14/04/07	Open			
Redmond, Terry	LE_TR_01	21/04/07	Open			
Redmond, Terry	LE_TR_01	28/04/07	Open			
Redmond, Terry	LE_TR_01	05/05/07	Open			
Redmond, Terry	LE_TR_01	12/05/07	Open			
Redmond, Terry	LE_TR_01	19/05/07	Open			

Total Results: 23

Submit for Approval Approve Return Timesheet Notify

Labor and Equipment Work Effort = Hours

To return a timesheet, select the timesheet and press 'Return Timesheet'.

The status of the timesheet will change to 'Returned', and you can work on the timesheet like before, and the timesheet needs to be resubmitted for Approval after the changes have been made.

Resource	ID	Period Start	Timesheet Status	Adjusted	Adjustment	Total
Redmond, Terry	LE_TR_01	08/01/07	Open			
Redmond, Terry	LE_TR_01	15/01/07	Open			
Redmond, Terry	LE_TR_01	20/01/07	Open			
Redmond, Terry	LE_TR_01	27/01/07	Open			
Redmond, Terry	LE_TR_01	03/02/07	Open			
Redmond, Terry	LE_TR_01	10/02/07	Open			
Redmond, Terry	LE_TR_01	17/02/07	Open			
Redmond, Terry	LE_TR_01	24/02/07	Open			0.00
Redmond, Terry	LE_TR_01	03/03/07	Returned			32.00
Redmond, Terry	LE_TR_01	10/03/07	Open			
Redmond, Terry	LE_TR_01	17/03/07	Open			0.00
Redmond, Terry	LE_TR_01	24/03/07	Open			
Redmond, Terry	LE_TR_01	31/03/07	Open			
Redmond, Terry	LE_TR_01	07/04/07	Open			
Redmond, Terry	LE_TR_01	14/04/07	Open			
Redmond, Terry	LE_TR_01	21/04/07	Open			
Redmond, Terry	LE_TR_01	28/04/07	Open			
Redmond, Terry	LE_TR_01	05/05/07	Open			
Redmond, Terry	LE_TR_01	12/05/07	Open			
Redmond, Terry	LE_TR_01	19/05/07	Open			

Total Results: 23

Submit for Approval Approve Return Timesheet Notify

Labor and Equipment Work Effort = Hours

Returned timesheet: rework and resubmit for approval.

The Resource Manager can also return a timesheet when he disapproves it. The effect will be the same: the status of the timesheet change to 'Returned' and the timesheet is open for modifications and need to be resubmitted for approval.

4.7.4 Adjust a Timesheet

If modifications to a timesheet are required after the timesheet has been posted, then an adjustment has to be made. This is another process than simply returning a timesheet, since a posted timesheet has already created financial transactions in the system.

Timesheet

Adjust Cancel [Printable Version]

Time Period: 27/10/03 - 02/11/03

Resource Name: Ralph Thomas Approved by: Piet van der Wiel

Timesheet Status: **Posted**

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30	Fri 10/31	Sat 11/1	Sun 11/2	Total	Posted Actuals	ETC	Baseline
31000300	Seraya warranty	1.1.1.3	Consultancy	113	Normal Rate	8.0	8.0	8.0	8.0	8.0	0.0	0.0	40.0	40.0	8.0	0.0
Total						8.0	8.0	8.0	8.0	8.0	0.0	0.0	40.0			

Adjust Cancel [Printable Version]

To adjust a timesheet, select the posted timesheet, go to the timesheet detail page, and press 'Adjust'.

A second timesheet is now created for the same week, with status '*Open*' while the posted timesheet remains available. The new timesheet is marked as '*Adjustment*'.

Timesheets

Filter: [--Select--]

Dates: All Open Time Periods

Timesheet Status: Open Submitted Approved Posted

Filter	Show All	Clear	Period Start	Timesheet Status	Adjusted	Adjustment	Total
☐	☐	☐	27/10/03	Open			40.0
☐	☐	☐	27/10/03	Posted			40.0
☐	☐	☐	03/11/03	Submitted			40.0
☐	☐	☐	10/11/03	Submitted			40.0
☐	☐	☐	17/11/03	Submitted			40.0
☐	☐	☐	24/11/03	Open			40.0

Submit for Approval Return Timesheet Delete Adjustment

Two timesheets for the same week, one is the originally posted timesheet; one is a copy to be able to do the adjustment.

The new timesheet is now available to make the adjustment(s). Editing the timesheet can be done in the same way as a normal, open timesheet.

Timesheet

Save Submit for Approval Populate Cancel

Time Period: 27/10/03 - 02/11/03 [Adjusted Timesheet]

Resource Name: Ralph Thomas Modified by: Ralph Thomas

Timesheet Status: **Open (Adjustment)** Last Modified: 27/11/03 10:28

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Mon 10/27	Tue 10/28	Wed 10/29	Thu 10/30	Fri 10/31	Sat 11/1	Sun 11/2	Total	Pos Act
31000300	Seraya warranty	1.1.1.3	Consultancy	113	Normal Rate	8.0	8.0	8.0	8.0	8.0	0.0	0.0	40.0	
Total						8.0	8.0	8.0	8.0	8.0	0.0	0.0	40.0	

Add Task New Indirect Row Split Delete

Save Submit for Approval Populate Cancel

You can switch the view between the new timesheet (editable) and the original posted timesheet (view only) by clicking on this link.

When you work on the open, adjustment timesheet, you have the option to view both the original 'Adjusted' and the new 'Adjustment' timesheet in the same view, called the 'Delta View':

03 - 9-11-03 [Adjusted Timesheet]

Name: Ralph Thomas Modified by: Ralph Thomas

Status: Open (Adjustment) Last Modified: 28-11-03 13:20

Project	Task ID	Task/Description	Charge Code	Type Code	Mon 3-11	Tue 4-11	Wed 5-11	Thu 6-11	Fri 7-11	Sat 8-11	Sun 9-11	Total	Posted Actuals	ETC	Baseline
Seraya warranty	1.1.1.1	Project Management	111	Normal Rate	6,0				4,0			10,0	12,0	0,0	0,0
Seraya warranty	1.1.1.3	Consultancy	113	Normal Rate	2,0	8,0	8,0		4,0			22,0	60,0	0,0	0,0
Subtotal: Tasks					8,0	8,0	8,0	0,0	8,0	0,0	0,0	32,0			
011: Statutory Holiday								8,0				8,0	0,0		0,0
Subtotal: Indirect Time					0,0	0,0	0,0	8,0	0,0	0,0	0,0	8,0			
Total					8,0	8,0	8,0	8,0	8,0	0,0	0,0	40,0			

Approval: [Split] [Delete] [Delta View/Configure] [Printable Version]

Open the 'Delta View'.

CLARITY Timesheet - Delta View

Time Period: 3-11-03 - 9-11-03 [Adjusted Timesheet]

Resource Name: Ralph Thomas Modified by: Ralph Thomas

Timesheet Status: Open (Adjustment) Last Modified: 28-11-03 13:20

Project ID	Project	Task ID	Task/Description	Charge Code	Type Code	Mon 3-11	Tue 4-11	Wed 5-11	Thu 6-11	Fri 7-11	Sat 8-11	Sun 9-11	Total	Posted Actuals	ETC	Baseline
31000300	Seraya warranty	1.1.1.1	Project Management	111	Normal Rate	6,0				4,0			10,0	12,0	0,0	0,0
	Seraya warranty	↳ Project Management	111	Normal Rate	8,0				4,0				12,0			
31000300	Seraya warranty	1.1.1.3	Consultancy	113	Normal Rate	2,0	8,0	8,0		4,0			22,0	60,0	0,0	0,0
	Seraya warranty	↳ Consultancy	113	Normal Rate	8,0	8,0		4,0					20,0			
Subtotal: Tasks					8,0	8,0	8,0	0,0	8,0	0,0	0,0	0,0	32,0			
011: Statutory Holiday								8,0					8,0	0,0		0,0

The 'Delta View' is a read-only view; you cannot edit the timesheet from here.

Adjustment line

Original line

Once the modifications are completed, the timesheet need to be re-submitted for approval. After approval and re-posting, both the timesheets remain available for historical reference.

CLARITY Timesheets

Timesheet Filter

Filter: [--Select--]

Dates: [All Open Time Periods] Timesheet Status: [Open] [Submitted] [Approved] [Posted]

From: 27/10/03 To: []

Filter	Show All	Clear	Period Start	Timesheet Status	Adjusted	Adjustment	Total
☒			27/10/03	Posted			40,0
☒			27/10/03	Posted			40,0
☐			03/11/03	Returned			40,0
☐			10/11/03	Submitted			40,0
☐			17/11/03	Returned			40,0
☐			24/11/03	Open			40,0

Submit for Approval Return Timesheet

The two timesheets are now both 'Posted', but the original timesheet is now marked as 'Adjusted' to indicate that this timesheet has been replaced by the timesheet that is marked as 'Adjustment'.

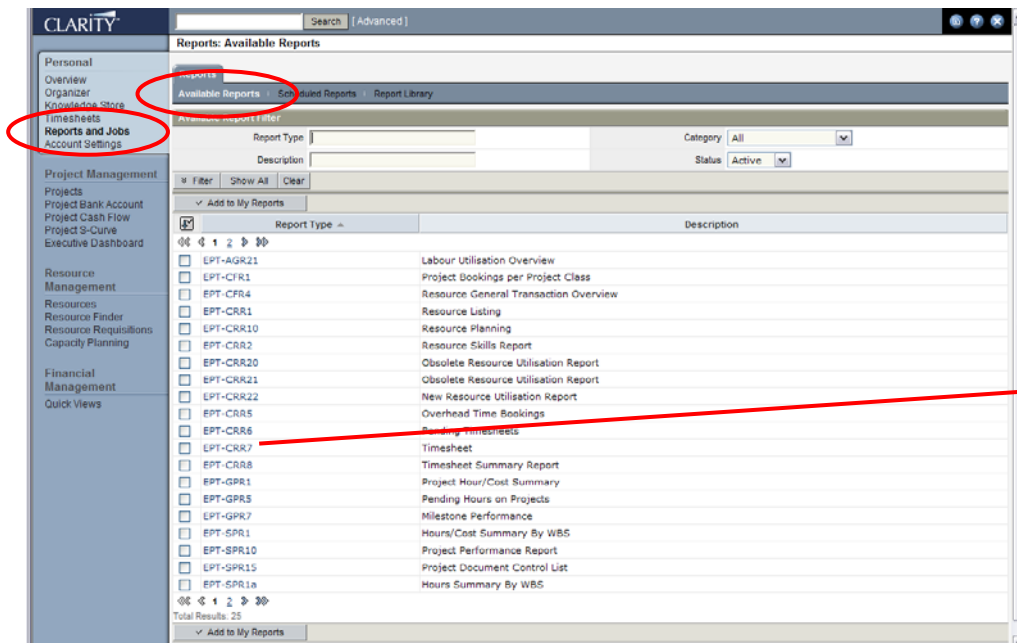
5 REPORTING

Reports in Clarity are generated by a separate, embedded report tool: Actuate. This reporting module provides a strong mechanism to run reports on any part of the Clarity database. The tool generates reports in an 'electronic' format that enables the user to e.g. perform search functions in the report output or distribute the report files via the email.

5.1 Run a Report

5.1.1 Select a report

What reports you can run are predetermined by the system administrator and depend on the security rights that are given to you.



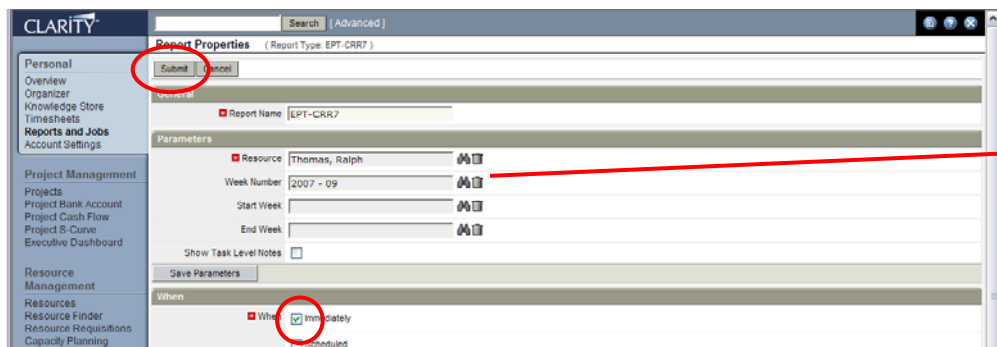
All reports where you have the rights to run are listed on the tab 'Available Reports'.

Click on the report name to run the report.

5.1.2 Report Parameters

All reports in Clarity do require input parameters to determine the data set to be reported on. There are three types of parameters:

- **Scope:** To determine what objects need to be included on the report.
- **Data:** To determine what information needs to be reported from the above selected objects
- **Format:** These parameters provide grouping and sorting selections.



Select the required parameters for this report. Then press 'Submit' to run the report.

5.1.3 The Report Viewer

If you run the report, Clarity will open a new window in which the report will be displayed:

Navigate to other pages of the report.

Enter the page number and press 'Goto' to navigate to a specific page.

To close the report, just close this window.

TIME SHEET

Employee : Thomas, Ralph
Employment Type : CONTRACTOR
Location : RIJSWIJK

Week : 45 - 2006
Status : Posted

Project	Project Name	WBS	Task Description	Activit Code	Type Code	Mon 06-Nov	Tue 07-Nov	Wed 08-Nov	Thu 09-Nov	Fri 10-Nov	Sat 11-Nov	Sun 12-Nov	Total
31001037	Kirishi FIV Project	2.1.5.1	Rosemount - Finalizing Datasheet	0112	Normal Rate	8.00	-	-	8.00	4.00	-	-	20.00
31001037	Kirishi FIV Project	2.3.5.1	Brooks - Finalizing Datasheets -	0112	Normal Rate	-	-	-	1.00	-	-	-	1.00
31001037	Kirishi FIV Project	2.4.5.1	Fisher - Finalizing Datasheets -	0112	Normal Rate	-	10.00	-	-	-	-	-	10.00
31001037	Kirishi FIV Project	2.5.5.1	VAD - Finalizing Datasheets - Lead	0112	Normal Rate	-	-	-	-	5.00	-	-	5.00
						8.00	10.00	-	9.00	9.00	-	-	36.00
						8.00	10.00	-	9.00	9.00	-	-	36.00

Timesheet Notes :

Approvals

		Totals per Type Code		Payment Req.	Appr.
Employee Signature	Approved By Manager	Normal Rate	36.00		
		Total Hours	36.00		
Date:	Date:				

Since the report does run in a fully 'electronic' environment, the system allows you to search for specific data within the report:

- Press the 'Search' option. The search pane will appear at the left side of the screen.
- Then select a field in the report that you want to search on: so if you want to search for a task name, press one of the task names in the report. The field is added to the search pane.

New Search Search Now

Click on a report field to add it to the search

Report Field	Value	Display
txtProjectID		☒

Search Now

Press 'Search' to open the search window at the left side of the screen, and then click on any project if you want to search for a project in this report. The project search field is now added to the search pane. Enter a project number and select 'Search Now'.

- Enter now the value for this field that you are looking for and press 'Search Now'. In the search pane, all occurrences of this value will now be listed.
- Press one of the occurrences from the list, and the report will display the page where this data is.

All occurrences of this value will be displayed.

Press on this highlighted number and the report will navigate to the page where this project is listed.

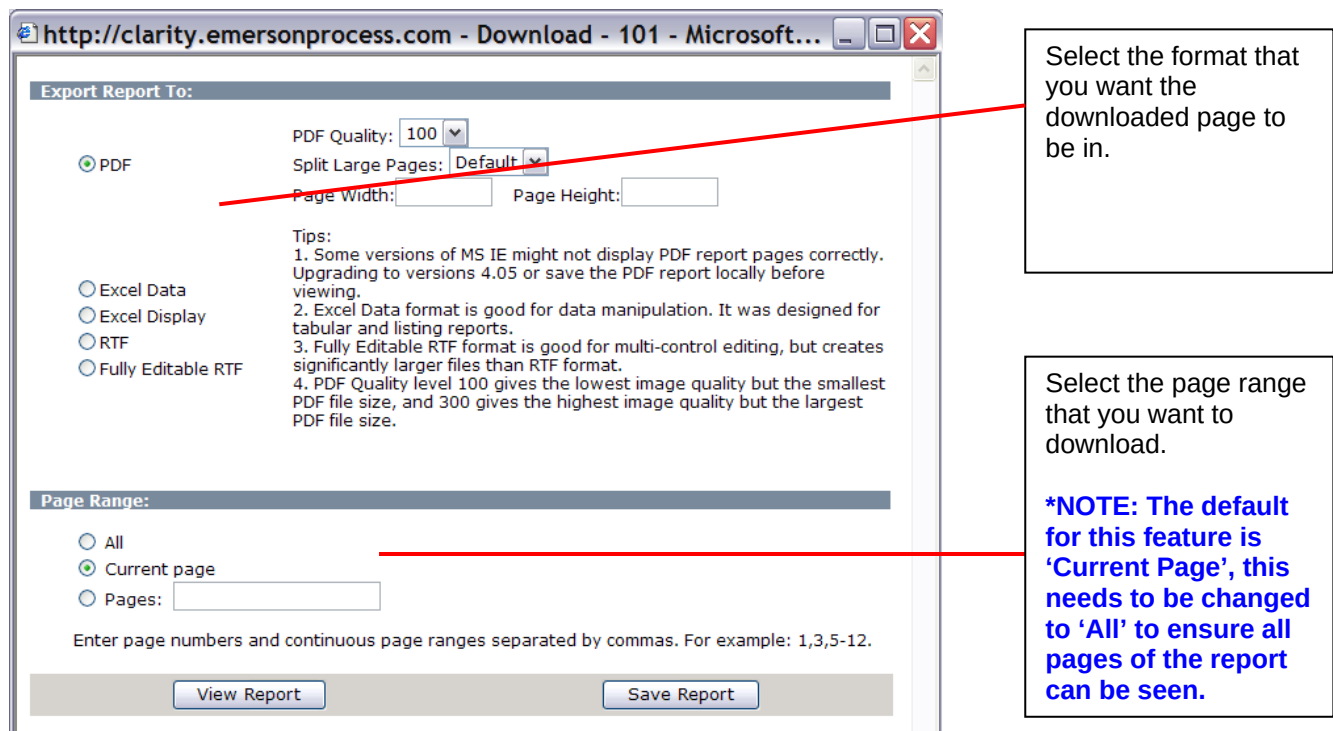
5.2 Download/Print a Report

Printing reports directly from the reports module is not possible. To print a report, you must download the report from Clarity to your local PC. There are two options available:

- Print or download the report in Acrobat format (this requires Acrobat Reader© to be installed on your local PC).
- Download the report in Excel format. The report data is now available for printing or further data processing.

Download and/or print the report in Acrobat format. The print option will directly download in Acrobat Reader© and start the print function.

Selection the 'Download' menu will open the following screen:



Select the format that you want the downloaded page to be in.

Select the page range that you want to download.

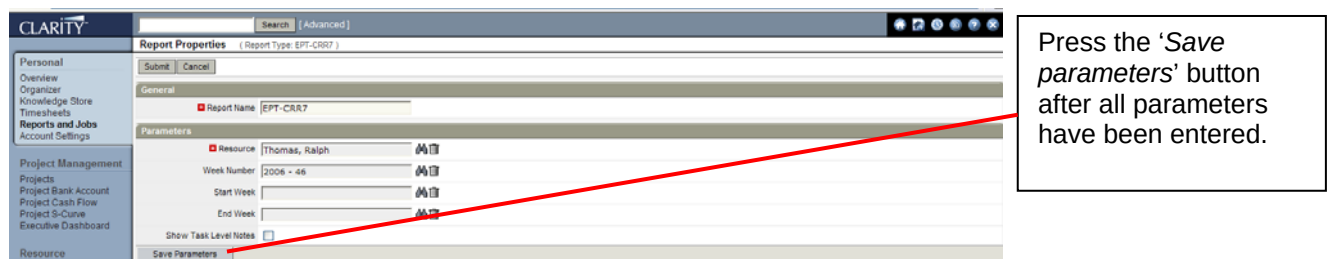
***NOTE: The default for this feature is 'Current Page', this needs to be changed to 'All' to ensure all pages of the report can be seen.**

From the Acrobat environment, you can print the report with standard Acrobat functionality. Note that - once you have downloaded the file to your local PC - the report is converted to the 'flat' Acrobat format and therefore the search functions are no longer available.

5.3 Additional Functions

5.3.1 Save Report Parameters

You can store a report in combination with the parameters of your choice, so you can quickly run the same report later without entering all the parameters again. This report can then be added to your list of favourite reports and is available directly from your personal page (if you have chosen to display 'My Reports' on your personal page).



Press the 'Save parameters' button after all parameters have been entered.

Give this report plus the selected parameters a unique name. Tick the 'Add to My Reports' box to make this available from your personal page.

http://clarity.emersonprocess.com - Clarity :: Save Parameters - Microsoft Internet Explorer

CLARITY

Save Parameters

☒ Saved Parameters Name: My Timesheet

Add to My Reports: ☒

Submit Close

☒ = Required

CLARITY

Overview: General

General News-17 (posted Aug-06) Report Updates Personal Assignments Capacity Planning

Action Items View: Action Items Assigned to Me

There are no action items to display.

My Projects

There are currently no projects to display. To add a project, select the Add to My Projects option on the project properties page.

My Reports

Report Name	Report Type	Saved Parameters
☒ My Timesheet	EPT-CRR7	

Remove (More)

Favorite Links

You have 0 items to display.

Notifications

Action Items	0
Change Requests	0
Discussions	20
Escalations	0
Events	0
Finance	0
Incidents	0
Issues	0
Processes	0

This report – with pre-populated parameters is now available to run directly from the overview page.

5.3.2 Scheduled Reports

It is also possible to schedule reports to run at a later moment. This is especially helpful with reports that do require a long time to build, or for reports that are required at a fixed interval.

CLARITY

Report Properties (Report Type: EPT-CRR7)

General

Report Name: EPT-CRR7

Parameters

☒ Resource: Thomas, Ralph

Week Number: 2006 - 46

Start Week: End Week:

Show Task Level Notes: ☐

Save Parameters

When

☐ Immediately

☒ Scheduled

Start Date: 3/6/07

Start Time: 11AM :00

Recurrence: Run Once (Set Recurrence)

Select the 'Scheduled' option from the Report Properties page. Select when to run the report: the start date and start time. If you want to run the report at fixed intervals, select 'Set Recurrence'.

Recurrences can be set to daily, weekly, or monthly intervals.

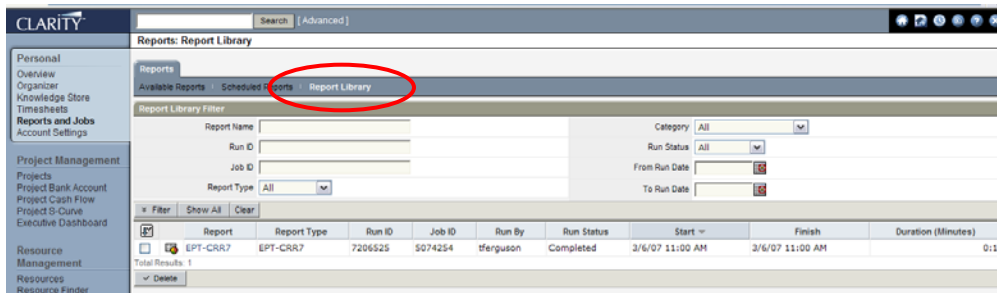
Leave 'Recur Until' empty if you do not want to specify an end date.

You can have the system generate a report notification when the scheduled report is either completed or when the report has failed to run.

Scheduled reports can be viewed in the second tab on the reports page.

Scheduled report jobs can also be deleted and cancelled from here.

Once the report has been executed by the system, the report is stored in the Report Library:

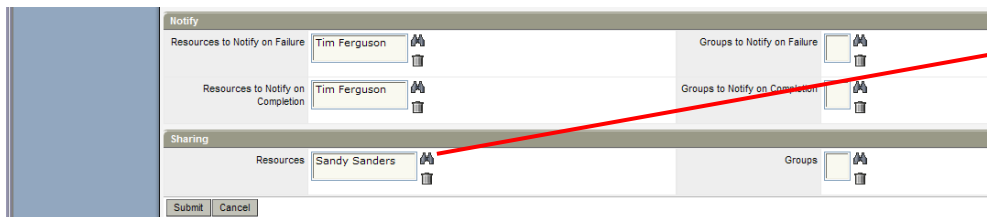


You can now open the completed report by clicking on the report name.

The reports are stored in the library for a number of days, and are then automatically removed by the system.

5.3.3 Share Reports in the Library

It is possible to share the reports in the report library with other Clarity users, e.g. your resource manager. At the report properties page, enter the resource(s) that should get access to your report. If the report has been executed, these people will now also have this report available in their report library.

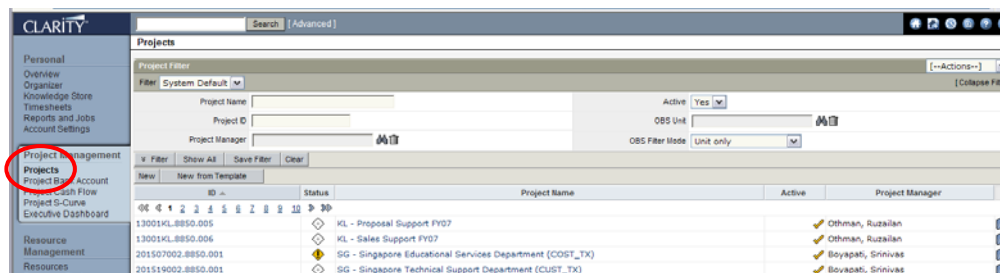


Select the resources that should get access to your report.

6 PROJECT PARTICIPATION

6.1 Select a project

Part of the functionality of the Clarity project module is that users can work together on projects. In Clarity this is called: project participation or collaboration. The projects on which you can work as a participant can be found in the 'Project Management' menu.



Select the 'Projects' menu to display all the projects where you have access rights. You can search and filter the list of projects.

The search function accepts wildcards, so you can enter for 300* to find all projects that begin with 300.

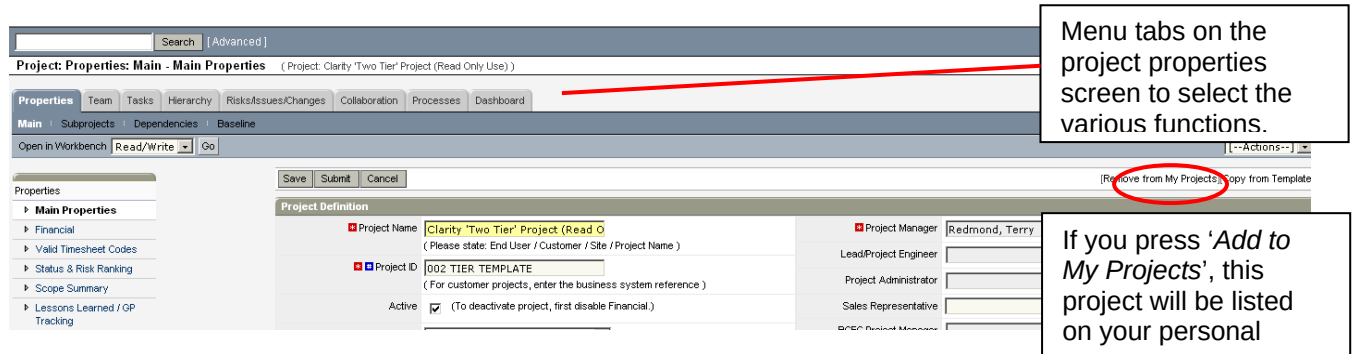
If you cannot find the project you are searching for, it might be that you have insufficient rights to that project. Check with the Project Manager if you have been added to the project.

Clicking on a particular project will open the project and display the properties page of that project.

6.2 Project Properties

If a project is selected, the project opens with the properties page, where general information from that project is given, like project name and description.

Depending on the project rights of the user, a series of menu tabs appear at the top of the screen, which can be used to view or modify the project data.



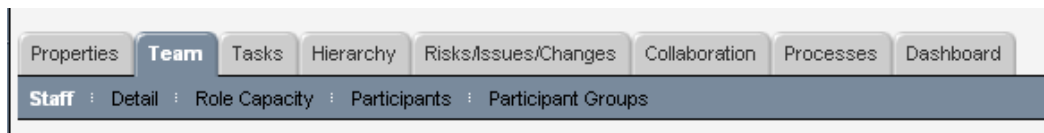
Menu tabs on the project properties screen to select the various functions.

If you press 'Add to My Projects', this project will be listed on your personal

Only a limited set of data will be displayed, based on the project rights that a user has. For a 'Project User' most of the properties will be read-only.

In the next paragraphs, this user manual describes those functions that can be used by the 'Project User'. For the other functions for Project Management or Resource Management, refer to the appropriate User Manuals.

6.3 The Team Tab



The Team tab is used to view the project in five different sub-tabs:

- **Staff:** Resources (either named resources or roles) on the project. This enables named resources to book time to this project.
- **Detail:** View the resources on this project in a detailed (graphical) allocation view.
- **Participants:** Users on the project enabled to collaborate on this project (share documents, participate in discussions, etc).
- **Role Capacity:** View the individual role capacity for each resource on the project.
- **Participants Groups:** A group is a sub-set from the list of project participants that you can use to easily select a number of participants by group, e.g. to give a group of people access to documents (design team, implementation team, etc).

6.3.1 Staff

Project Team: Staff (Project: Clarity "Two Tier" Project (Read Only Use)) [Manage Project Tabs]

Properties | **Team** | Tasks | Hierarchy | Risks/Issues | Changes | Collaboration | Processes | Dashboard

Staff | Detail | Role Capacity | Participants | Participant Groups

Project Team - Filter [Filter: System Default] [Actions] [Expand Filter]

Add | Add/Update by OBS | Remove | More>>

	Resource / Role	Resource ID	Project Role	Open for Time	Start	Finish	% Allocation				
☐	Document Controller	DC	Document Controller		03/12/07	24/09/08					
☐	Hardware Engineer	HE	Hardware Engineer		03/12/07	24/09/08					
☐	Integration Engineer	IE	Integration Engineer		03/12/07	24/09/08					
☐	MES Senior Engineer	SME	MES Senior Engineer		03/12/07	24/09/08					
☐	PAS Consultant	CO	PAS Consultant		03/12/07	24/09/08					
☐	PAS Engineer	SE	PAS Engineer		03/12/07	24/09/08	100.0%	1,704	0.00	0.00	
☐	PAS Lead Engineer	LE	PAS Lead Engineer		03/12/07	24/09/08	100.0%	1,648	0.00	0.00	
☐	Planner	PL	Planner		03/12/07	24/09/08	100.0%	1,624	0.00	0.00	
☐	Project / Service Administrator	PA	Project / Service Administrator		03/12/07	24/09/08	100.0%	1,704	0.00	0.00	
☐	Project Manager	PM	Project Manager		03/12/07	24/09/08	100.0%	1,704	0.00	0.00	
TOTAL								15,897	0.00	0.00	

Total Results: 10

Add | Add/Update by OBS | Remove | More>>

Work Effort = Hours

The Team tab, 'Staff' page where resources can be allocated.

Click on the name of the resource to view this resource's allocation details.

Click on this icon to see all projects where this resource is working on.

Staff Member Properties (Investment: Clarity "Two Tier" Project (Read Only Use)) Role: Planner

Properties | Skills | Bookings

Save | Submit | Cancel

General

Resource: Planner

Start Date: [Calendar Icon]

Finish Date: [Calendar Icon]

Project Role: Planner [Icon]

Default % Allocation: 0.01%

Booking Status: Hard

Open for Time Entry: ☐

Allocation

	Start	Finish	% Allocation
☐ 03/12/2007	30/03/2008		0.01%
☐ 31/03/2008	02/05/2008		100.00%
☐ 03/05/2008	25/05/2008		0.01%
☐ 26/05/2008	04/07/2008		100.00%
☐ 05/07/2008	27/07/2008		0.01%
☐ 28/07/2008	29/08/2008		100.00%
☐ 30/08/2008	24/09/2008		0.01%
☐ [Calendar Icon]	[Calendar Icon]		

New Row | Delete

[Icon] = Default Segment

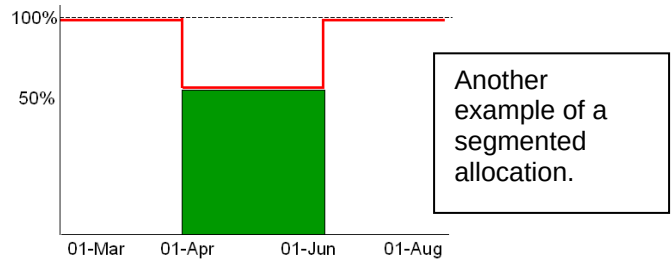
Save | Submit | Cancel

[Icon] = Required

The staff member properties page where allocation details can be seen.

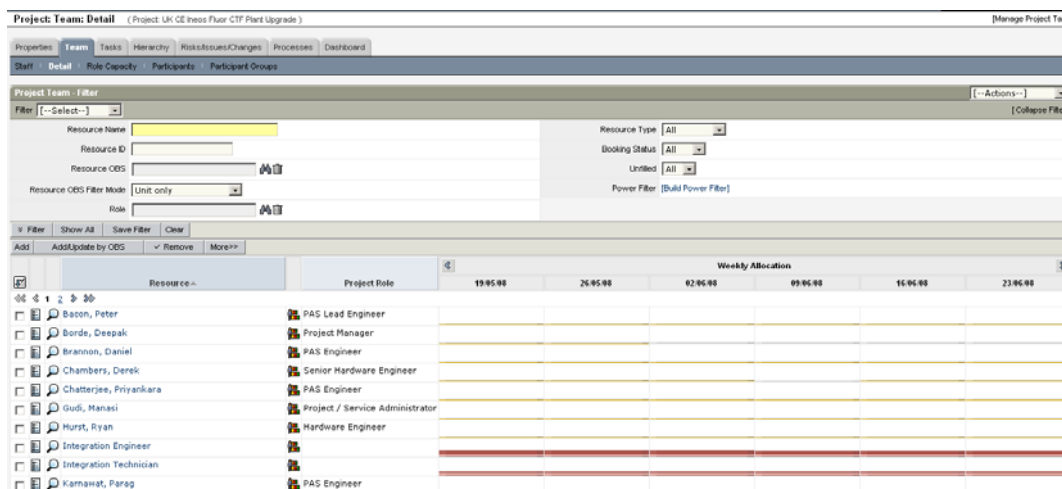
Since the allocation of a resource is not necessarily equally spread over the duration of a project, allocation segments can be created. A segment is a time period with a specific allocation percentage for that time period. See the example below:

Allocation			
	* Start	* Finish	% Allocation
☐	01/03/07	31/03/07	100.00%
☐	01/04/07	31/05/07	50.00%
☐	01/06/07	01/08/07	100.00%
☐			
New Row Delete			
= Default Segment			
Save Cancel			
* = Required			



6.3.2 Detail

On the detail sub-tab you can view the weekly allocation of the resources on the project in a stacked bar chart. This view can also be edited to show tabular information. For more details contact the Project Office.



6.3.3 Role Capacity

On the role capacity sub-tab you can view the weekly allocation of the resource roles being used on the project. This view can also be edited to show tabular information. For more details contact the Project Office.

Project: Team: Role Capacity (Project: UK CE Ineos Fluor CTF Plant Upgrade)

Properties Team Tasks Hierarchy Risks/Issues/Changes Processes Dashboard

Staff Detail Role Capacity Participants Participant Groups

Role Capacity Filter: System Default

Role	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08
Hardware Engineer						
PAS Engineer						
PAS Lead Engineer						
Project / Service Administrator						
Project Engineer						
Project Manager						
Senior Hardware Engineer						
Service Engineer						
SIS Hardware Engineer						
SIS Lead Engineer						

6.3.4 Participants

On the participants sub-tab you can add the Users that can view the resources who can collaborate on the project. These are the people that have access to documents, discussions and workflows, etc.

Project: Team: Participants (Project: Clarity 'Two Tier' Project (Read Only Use))

Properties Team Tasks Hierarchy Risks/Issues/Changes Collaboration Processes Dashboard

Staff Detail Role Capacity Participants Participant Groups

Show: Resources Add By Resource ID

	Last Name	First Name	Resource
☐	Bhowte	Sarika	PU_SB_16
☐	Grande	JoseAntonio	MA_JG_02
☐	Joshi	Sourabh	PU_SJ_14
☐	Kadam	Vinayak	PU_VK_06
☐	Nabar	Amit	PU_AN_04
☐	Redmond	Terry	LE_TR_01
☐	Zwaans	Pim	RI_PZ_01

Total Results: 7

Add Remove Make Collaboration Manager Make Participant Add Staff

The Team tab, Participants page where participants can be defined.

This icon indicates that this person is the collaboration manager. The collaboration manager can add new participants to the team, and has more rights in the collaboration functions.

6.3.5 Participants Groups

A group is a sub-set from the list of project participants that you can use to easily select a number of participants by group, e.g. to give a group of people access to documents (design team, implementation team, etc).

Project: Team: Participant Groups (Project: UK CE Ineos Fluor CTF Plant Upgrade)

Properties Team Tasks Hierarchy Risks/Issues/Changes Processes Dashboard

Staff Detail Role Capacity Participants Participant Groups

No results found. Modify your search as needed.

6.4 Tasks

The Tasks module shows the tasks associated with the project. In this module you can see the Work Breakdown Structure, Resource Utilization, Assignments, and Forms.

List of tasks on this project.

6.5 Processes

Processes are workflows that can be applied to projects or documents. Users can build and apply processes as required, but this is not (yet) supported by the Project Office.

6.6 Dashboard

The Dashboard shows a summary of the whole project. Details of the 'Dashboard' contents are available in the 'User Manual for the Project Manager'.

Project Key Information		Value	Stoplights	Status
Project ID	002 TIER TEMPLATE		Overall Project Status	Green Diamond
Project Name	Clarity 'Two Tier' Project (Read Only Use)		Estimated Hours Budget Overrun	Yellow Diamond
Description	For Terry Redmond testing purposes only		Risk Ranking	Green Diamond
Project Manager	Terry Redmond		Schedule Performance	Green Diamond
Lead Engineer			Resource Allocation	Red Diamond
Project Last Baseline				

Project Status		Description
General Status	Project Management Office defined schedule incorporating the 'Two Tier' project scheduling technique. The schedule provides the Project Manager with two levels of detail. The 'Top Tier' activities (Customer) are of 'Fixed' duration and are not open for time entry. These activities are linked to the agreed mandatory milestones that are then tracked on a regular basis.	
Project Staffing		
Engineering / Technology		
Customer Satisfaction		
Miscellaneous		

Milestone	Original Baseline Date	Original Variance Days	Active Baseline Date	Active Variance Days	Completed	Expected Date	Comments
Specification Approved		0		0	No	22 Feb 2008	
SW FAT Start		0		0	No	25 Jul 2008	
HW FAT Start		0		0	No	24 Jun 2008	
SW Delivery		0		0	No	17 Sep 2008	
HW Delivery		0		0	No	21 Jul 2008	

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